

Required Changes and Recommended Testing

Encompass Azure Migration Checklist		Expected Result	Yes/No or N/A										
NEW Encompass IP details – Required Changes (if your institution is using an IP allowed list or web services)													
NEW SFTP server IP (Can be added prior to 2/13)	20.96.25.122 active SFTP Domains: sftp.imodules.com, prodsftp.imodules.com	Ensure you can access your Encompass SFTP folder if you are using it for data import or exports.											
Current SFTP server IP (remove AFTER migration)	139.146.146.150	Remove this Encompass SFTP IP after the production update is completed on 2/13.											
NEW System outgoing IPs (Can be added prior to 2/13)	<table border="0"> <tr> <td>20.65.14.24</td> <td>20.65.14.29</td> </tr> <tr> <td>20.65.14.25</td> <td>20.65.14.30</td> </tr> <tr> <td>20.65.14.26</td> <td>20.65.14.31</td> </tr> <tr> <td>20.65.14.27</td> <td>(or cidr notation 20.65.14.24/29)</td> </tr> <tr> <td>20.65.14.28</td> <td></td> </tr> </table>	20.65.14.24	20.65.14.29	20.65.14.25	20.65.14.30	20.65.14.26	20.65.14.31	20.65.14.27	(or cidr notation 20.65.14.24/29)	20.65.14.28		If you currently whitelist Encompass IP detail you will need to add these IPs to your whitelist. You should add these prior to the migration.	
20.65.14.24	20.65.14.29												
20.65.14.25	20.65.14.30												
20.65.14.26	20.65.14.31												
20.65.14.27	(or cidr notation 20.65.14.24/29)												
20.65.14.28													
Current System IPs (remove all AFTER migration)	<table border="0"> <tr> <td>139.146.160.110</td> <td>139.146.160.115</td> </tr> <tr> <td>139.146.160.111</td> <td>139.146.146.209</td> </tr> <tr> <td>139.146.160.112</td> <td>139.146.146.213</td> </tr> <tr> <td>139.146.160.113</td> <td>139.146.160.23</td> </tr> <tr> <td>139.146.160.114</td> <td>139.146.160.24</td> </tr> </table>	139.146.160.110	139.146.160.115	139.146.160.111	139.146.146.209	139.146.160.112	139.146.146.213	139.146.160.113	139.146.160.23	139.146.160.114	139.146.160.24	Remove these Encompass IPs after the production update is complete on 2/13.	
139.146.160.110	139.146.160.115												
139.146.160.111	139.146.146.209												
139.146.160.112	139.146.146.213												
139.146.160.113	139.146.160.23												
139.146.160.114	139.146.160.24												
NEW web services IP (Can be added prior to 2/13)	*20.122.181.2 (*only needs to be included if you utilize web services)	Ensure you can access your Encompass data via web services (Encompass API). This will need to be updated during or after the migration.											
Current web services IP (remove AFTER migration)	139.146.160.64	Remove this Encompass SFTP IP after the production update is complete on 2/13.											
Data													
Access to Web Services (if applicable)	Test web services access	Do you have access to the Encompass API / Web Services?											
Email													
Email Sends	Create a new email with content and images. Test that you can upload lists and create email segments. <i>You will not be able to test sending an email until after the upgrade completes.</i>	Did your email test complete successfully?											

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Commerce			
Process a Commerce Transaction	Make a donation or other commerce transaction to ensure commerce transactions are processing correctly.	Did the transaction process a successful payment and return the email confirmation as expected?	
Authentication			
Testing Single Sign On (if applicable)	If you utilize Single Sign On make sure that you can login using this feature.	Does SSO work properly?	

Optional Items to Test

Encompass Azure Migration Checklist		Expected Result	Yes/No or N/A
Data			
Scheduled Exports	Make sure you are still receiving all scheduled exports and that the exports look correct and contain all data that you expect. <i>Scheduled exports will resume the morning of Monday, February 14.</i>	Are scheduled exports still and are they being received as expected?	
Site Is Accessible and Navigation Review			
Homepage links	Spot check the navigation on your homepage and that child pages are displaying under the parent page.	Do the links function as expected and direct the user to the proper pages? Does the homepage look as expected?	
Interior page links	Review one of the interior pages on your site to ensure that the links and images are displaying as expected.	Do the links function as expected? Do images display as expected?	
Online Directory			
Simple and Advanced Directory search	Test the directory search function and that you can return the correct data based off your search criteria.	Does the directory return results as expected?	
Forms - Events/Donations/Profile			
Donations Form Review	Make a donation from an existing form.	Did the donation form process a successful payment and return the email confirmation as expected?	
Event Form Review	Create a test event and then register for the event as a constituent. Make sure that the confirmation emails go out and are received and that the attendee list is updated.	Did the event form creation and submission complete as expected?	
Edit Profile Form	Make sure you can login and make edits to your profile form as both an end user and an admin.	Are the profile form edits completing as expected?	