

Conversion Pro Premium Implementation Overview

This implementation will transition your AMME site's core content to a new platform, ensuring accessibility, consistency, and functionality. Conversion Pro Premium Implementation includes configuration of up to 6 existing meeting types, up to 6 existing boards, 1 approval workflow per existing meeting type, 1 existing staff report, access to 4 hours of group training, 1 hour of consulting, and recorded training resources. Our goal is to deliver a seamless transition, empowering you to create and publish your meeting agendas in a format that is accessible and aligned with your current needs.

Conversion Process Overview

Migrating your AMME contents is a structured process designed to ensure accuracy, consistency, and a smooth transition to your new AMMS platform. Here's what you can expect during this process:

1. Kickoff Call
 - a. We will confirm the core project team, project scope, discuss Agenda and Minutes designs (optional: Item Report style and workflow), and updates for ADA compliance. Additionally, we will review dates for Design Review, Group Trainings, and your Launch Discussion.
 - b. We will review your new AMMS site, configured Agenda and Minutes designs (optional: Item Report style and workflow), and Staff User Import
2. Group Trainings
 - a. We will conduct four (4) 1-hour training sessions covering the following topics:
 - i. System Configuration
 - ii. Agenda Creation
 - iii. Item Creation
 - iv. Minutes Creation
 - b. *Additional Group Training (1 hour) is available at an additional cost.*
 - c. *An optional CivicPlus Media Training (30 minutes) is available at an additional cost to review CP Media Configuration, perform a live test of CP Media, and provide CP Media Training.*
3. Launch Discussion
 - a. We will meet for 30 minutes before your launch to discuss open questions and/or resolve lingering items

- b. *An optional Post-Launch Discussion (30 minutes) is available at an additional cost to meet and discuss any open questions and/or resolve lingering items.*

Included vs Not Included

The following table provides an overview of what is included as part of the Conversion Process and what is not included as part of the migration.

Included in Conversion	Not Included
Configuration of up to 6 existing Meeting Types*	Additional Agenda and Minutes designs (unique or design library)*
Configuration of up to 6 existing Boards*	Additional Item Report (Staff Report) designs (unique or design library)*
Configuration of 1 Approval Workflow per existing meeting type (up to 6 total)*	
Configuration of 1 existing Item Report (Staff Report)*	
One-time bulk User/Staff List import	
Access to 4 hours of Group Training	
Access to 1 hour of Consulting time	
Access to recorded training resources	

*Additional configuration and design can be completed by customers at no charge. Additional configuration and design can be completed by CivicPlus/AMMS Implementation Team at cost. Please review with your Implementation Consultant for more information.

Customer Configuration/Work Expectations

Customers will be expected to configure, maintain, and test the following information inside the AMMS system during the Conversion process:

- Establishing Departments
- Configuration of User/Staff permissions for each individual user based on the necessary permissions (ex: Meeting Type permissions, Item permissions, Event permissions, access to Settings menus, etc)
- Establishing Item Categories and assigning to Meeting Types as necessary
- Complete assigned Homework and Testing practice assignments
- Create and review necessary Event Categories and Event Templates

Glossary of Terms

Agenda Design

All agendas will share the same header and footer design. Information contained in the header/footer design (ie: logos, addresses, special meeting type designation, meeting disclosure language, etc) can be customized via editable fields.

Minutes Design

All minutes documents will share the same header and footer design. Information contained in the header/footer design can be customized via editable fields.

Configuration of Meeting Types

After the Agenda Design is confirmed, all configured meeting types (also known as agenda templates) will be configured utilizing the agreed upon design. Each configured Meeting Type can have it's own standing sections, items, and information configured into customizable fields at the agenda and item level.

Item Report

Often goes by other names, such as Staff Report, Memorandum, or Cover Letter. All Item Reports produced will share the same header/footer design and contain the same pre-determined text and fields that will automatically pull in from created agenda items.

Approval Workflows

Approval Workflows (or templates) are linear paths for agenda item review. These workflows can be assigned to Item Categories (the type of agenda item being created), Departments, or at the Meeting Type Level (meaning all items will follow the same workflow unless otherwise designated). More information on Approval Workflows can be found [here](#) and in the [Help Center](#).

Consulting Hours

These are any additional meeting and/or training hours that are scheduled with your Project Manager or Implementation Consultant outside of normal meeting or training hours.