

Building a Roadmap to iMIS EMS

Presented by:
Association Technology Solutions

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 120 integrations
- ASI's Client Sales Leader of the Year and Chairman Circle for 2020



Presenter:

Michelle Clemovich, CiP

Senior iMIS Consultant

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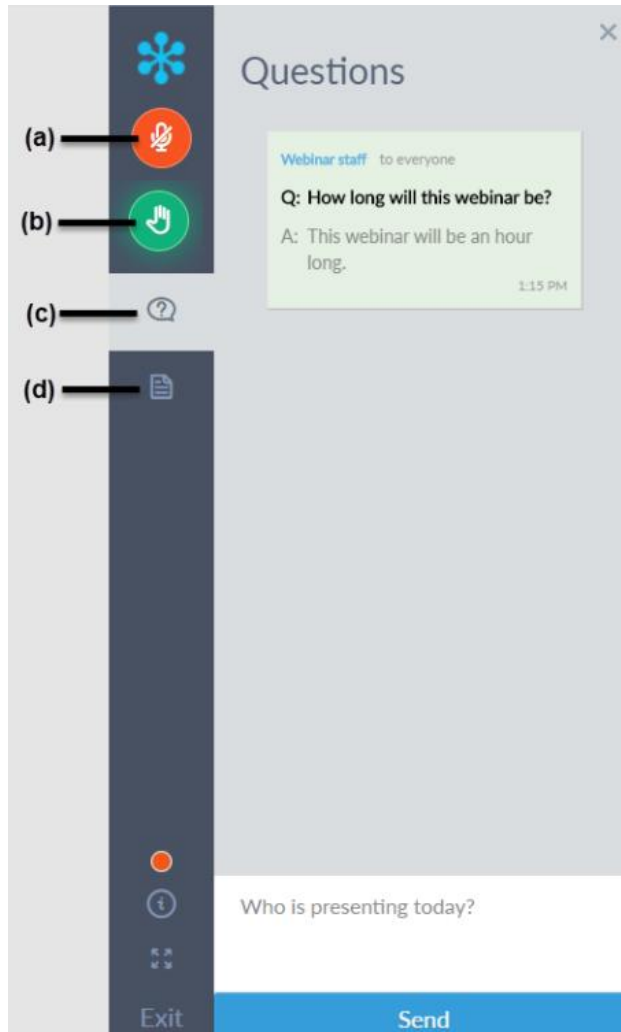
Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

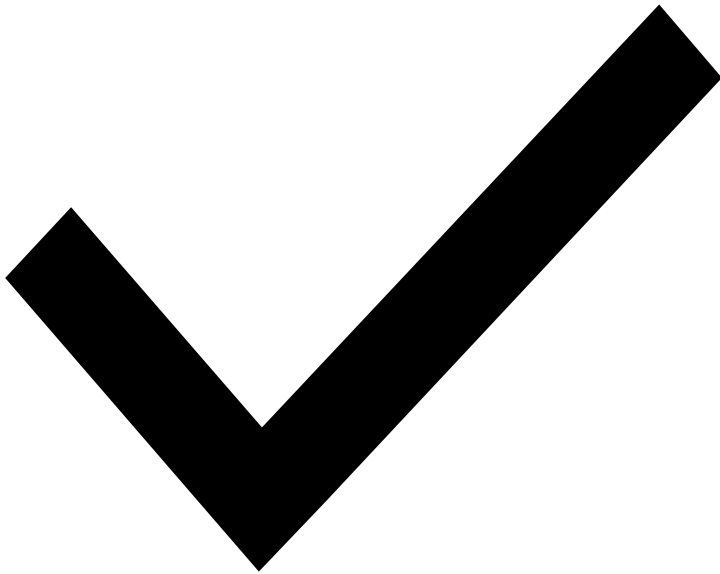
Email: rbanks@atsol.org



- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete

iMIS EMS Move timeline

- In progress
- Within 1-2 years
- Within 3-5 years
- Never





iMIS EMS Options

Feature/Benefit	Option 1 - CLOUD	Option 2 - 20/20 Advance Program*	Option 3 - Self-Hosted*
	Typically, a good option for clients with minimal customizations	Typically, a good option for clients with some customizations	Typically, a good option for large, complex clients with extensive customizations
Hosting Environment	ASI Hosting – Azure	ASI Hosting – Azure	Client Preference
ASI Upgrade Support	✓	✓	Partner/Client Responsibility
Automatic Updates	✓	Partner/Client Responsibility	Partner/Client Responsibility
New Feature Delivery Schedule	Continuous	Periodic	Periodic
Security, Disaster Recovery, & PCI Validation	✓	✓	Hosting Provider Responsibility
RESTful API Supported	✓	✓	✓
Pay Central Included	✓	✓	✓
New Subscription Agreement Required	Yes	Yes	Yes
Availability	Now	Now	Now

*One 'Standard VDS' included for free for first 6 months, ½ price per month for second 6 months, and standard rates after 12 months.

*Client must complete the Cloud Readiness Survey.



- Call your Authorized iMIS Solution Provider
- Run the customization scripts
- Remove all customizations!!!



- Download scripts at [https://help.imis.com/enterprise/upgrading to imis ems/considerations before beginning an upgrade.htm](https://help.imis.com/enterprise/upgrading%20to%20imis%20ems/considerations%20before%20beginning%20an%20upgrade.htm)
- Run in SQL (or have your AiSP run them)
- Break results out in spreadsheet tabs (Tables, Triggers, Stored Procedures, Functions)

[UPGRADING](#)[NEW FEATURES & UPGRADE CHANGES](#)[DOCUMENTATION](#)[VIDEOS](#)[SUPPORT](#)

Tip: Use quotes to search for specific phrases

The following have been identified as the top items that must be considered before starting the iMIS EMS upgrade process with any client.

Use the [Customization](#) and [Additional Complexities](#) scripts on a client's 20.2.66 database to understand which of the below items will apply to the client. The Additional Complexities script comes with a ReadMe file that should be read before attempting to review the script results.

System requirements
Desktop migration to the Staff site
Testing iMIS EMS
Pre- and post-upgrade tasks

Tip! To review the below content in a checklist form, download the following Word document: [iMIS EMS Upgrade Analysis Checklist](#)



Segregate



Archive



Analyze

By Type

- Tables
- Views
- Stored Procedures
- Triggers
- Functions

By Department/iMIS Module/Business Unit

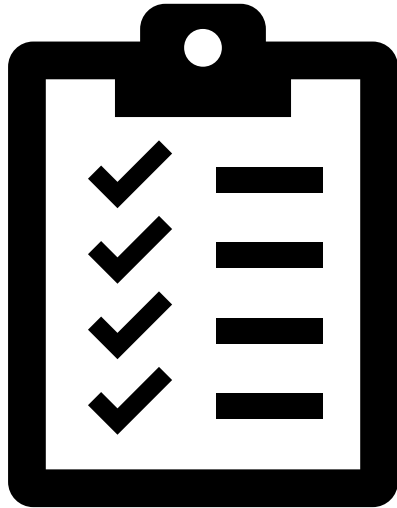
- Membership
- Finance
- Events
- Certification
- Fundraising

Level of Effort

- Difficulty
- Frequency
- Benefit

Process	Customizations	Frequency	Level of Effort	Priority
Join Process (7 member types)	15 stored procedures	Daily	High	3
Monthly Status Change	1 stored procedure 2 Views	Monthly	Med	2
Year End Processing	3 stored procedures	Annually	Low	4
Activity Updates	1 Trigger	Daily	Low	1

What Can I do Now?

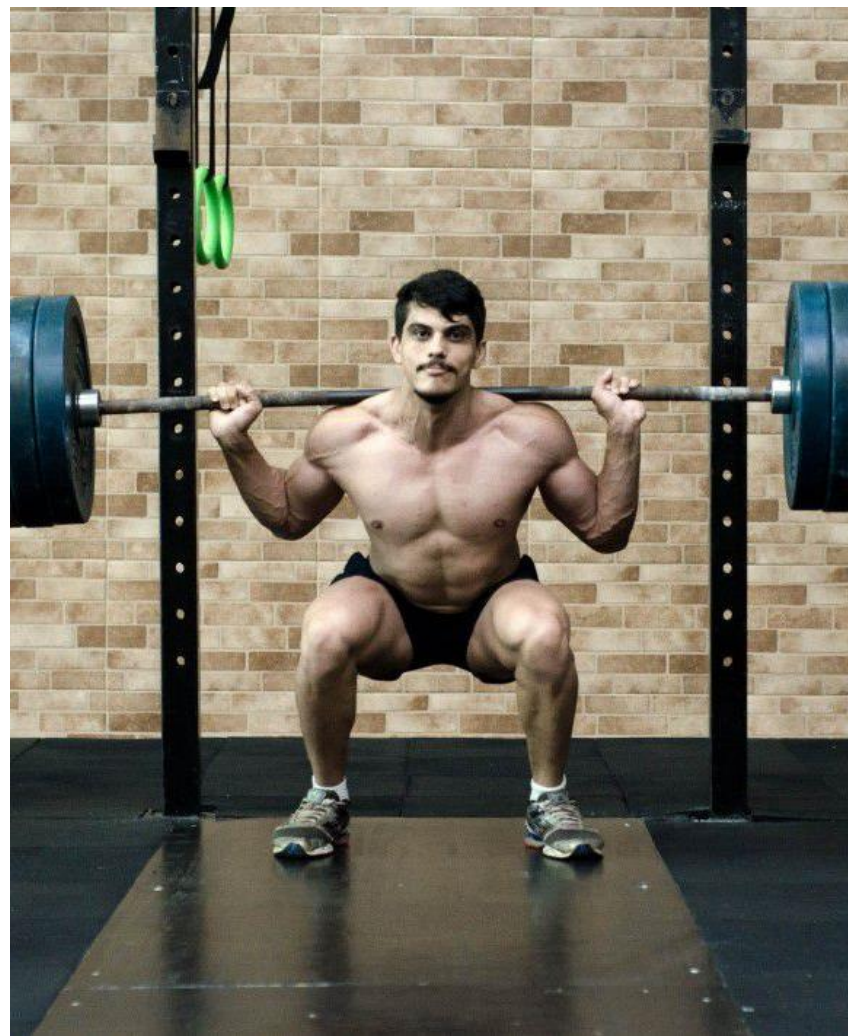


No longer used

- Views
- Backup tables
- Stored Procedures

Rename with 'Z_'

- Who uses it
- What is it doing
- When is it used
- Where is it used
- Why is it necessary to the organization or business process
- How is it used



What is the end goal of the process?

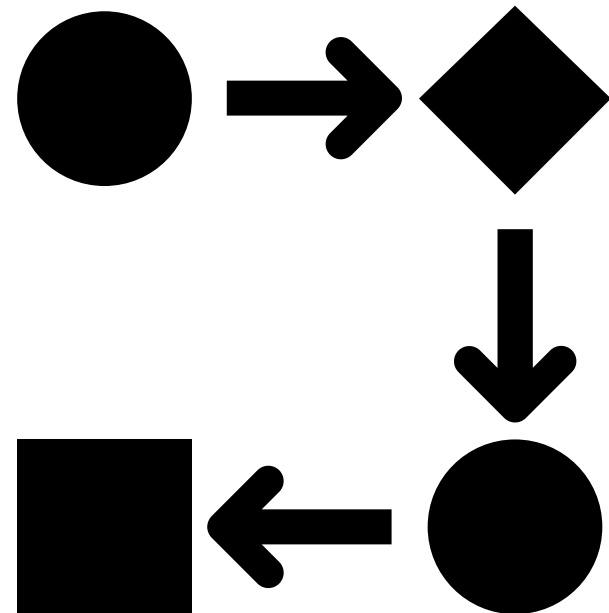


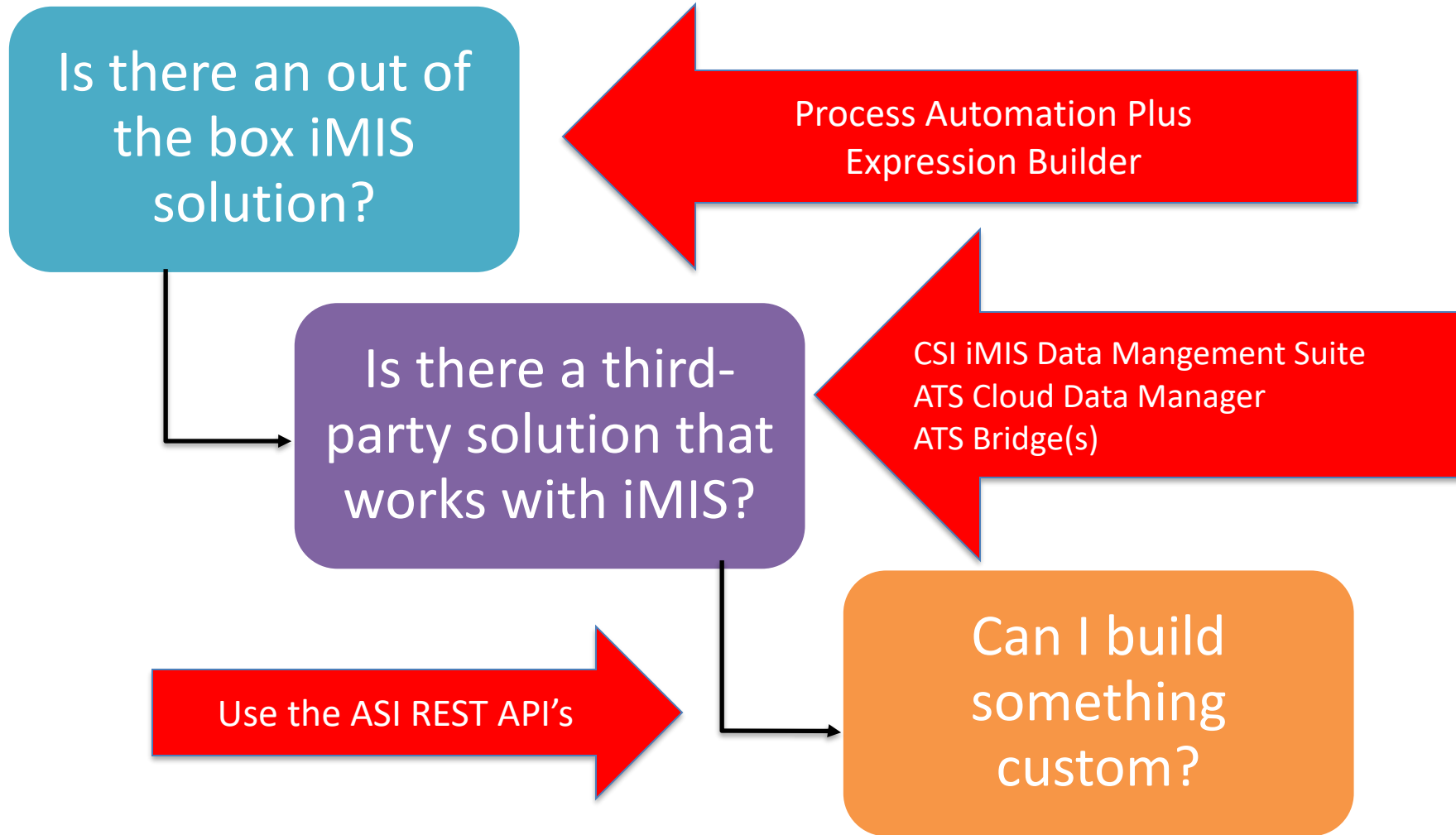
Who benefits? (Member/Prospect/Staff)



How does this effect the UX?

- Talk with process owners
- Flowchart processes
- Look for places to streamline

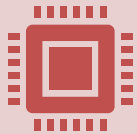




Process	Create in Dev	Test	Move to Prod
Join Process	4Q22	3Q23	4Q23
Monthly Status Change	3Q22	4Q22	1Q23
Year End Processing (June 30)	1Q23	1Q23	2Q23
Activity Updates	3Q22	3Q22	3Q22



Is Dev database current?



What work will be overwritten in Dev with a database refresh?



Should this be outsourced?

Time constraints

Costs



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