

Discovery Conference 2009

Upgrading to *iMIS* 15

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Agenda

- Licensing
- Pre-conversion checklist
- Testing
- Upgrade Steps
- Scheduling
- Post Upgrade Support/Training

Licensing

Rule #1 – Do not even schedule the upgrade until you have your licensing issues resolved

Licensing

- Named Users = # of Concurrent Users * 1.2
 - Round up
- Public Users = # of Concurrent Users * 2,250
 - Move into correct block of licenses
- 1 'Free' Casual User per 10 Concurrent Users
 - No rounding up

How many users?

- Find out how many people have logged into the database in the last month
`select * from users where
LastLogin > dateadd(m, -1, getdate())`
- Place results into an Excel and fill out/adjust.

How many users?

	A	B	C	D	E	F
1	Full Users do table maintenance and go into modules other than Membership/Customer					
2	Casual Users have full edit privileges in Membership/Customers, Reporting					
3	only privileges in all other modules except AR Cash where they have no					
4	permissions					
5	Place an X in the Full User or Casual User for each login					
6	Delete Users who are no longer with the organization					
7	Don't forget to consider consultants					
8						
9	UserID	User Name	Last Login	Full User	Casual User	
10	ACOLEMAN	Ashley Coleman	1/16/2009		X	
11	AENGBERG	Ashley Engberg	12/18/2008		X	
12	AFITZGERALD	Ashley Fitzgerald	1/15/2009	X		
13	ASCOTT	Amber Scott	1/21/2009		X	
14	BAPPLEBAUM	Beth Applebaum	1/20/2009		X	
15	BVESELKA	Brittany Veselka	1/19/2009	X		
16	CCOOK	Cari Cook	1/8/2009		X	
17	CJOLLY	Cile Jolly	1/19/2009	X		
18	CMORRISON	Collette Morrison	1/20/2009	X		
19	CSHANNON	Carol Shannon	1/22/2009	X		
20	DBOWMAN	Dawn Bowman	1/22/2009	X		
21	EDUNN	Erin Dunn	1/19/2009	X		
22	GCALAWAY	Georgia Calaway	12/17/2008		X	
23	JGOMEZ	Jason Gomez	1/15/2009		X	
24	JLARSON	Jamye Larson	1/22/2009	X		
25	JTHOMAS	Jennifer Thomas	1/21/2009	X		
26	KKYSER	Kristin Kyser	1/22/2009	X		
27	KSTILES	Katie Stiles	1/21/2009			
28	LAnderson	Lauren Anderson				

How many users?

- Remember, you do not need to pay for Manager login and should delete your AiSP login if there is one.
- Consider swapping Full for Casual users (officially ASI says 2 casual for 1 full)
- Work hard to ensure you get a fair deal – ASI want you to upgrade!

Pre-Conversion

- Confirm server specifications
 - Now is a great time to check into server infrastructure and recommend upgrades
 - See SQL Hardware and Software Recommendations handout for recommended options
 - Time to upgrade from SQL 2000?

Pre-Conversion

- Determine how you are going to handle your web stuff
 - Keep e-Series
 - New web login
 - New PayFlow Pro gateway

Pre-Conversion

- Start syncing the users table with the Name_Security table
 - All users need a password of 6 characters or more
 - All users must have a matching login in the Name_Security table (so each user needs a name record in *iMIS*). Don't worry about password matching.

Pre-Conversion

- Obtain all required license keys
 - CSA
 - iEmail
 - iMerge/Meeting Closer
 - Other third party products

Testing

- Test the actual upgrade on a test server
 - Restore copy of **iMIS** on SQL Server
 - Find spare server to act as Application Server*
 - Upgrade to 15.0.3.1871 or 15.1 (if on less than 10.6 the upgrade will be stepped)
 - Apply latest patch

*Consider using VMServer

Testing

- Test the actual upgrade on a test server
 - Perform a full test plan (we had 100 test scenarios and we still missed things!)
 - Test the bejezus out of your customisations, then get them fixed!
 - Factor in some budget for assistance (we had 4-5 days including customisation fixes)

Testing

- Pay close attention to IQA/Marketing Suite/Process Manager
 - Custom business objects will often not come over, make sure your IQA queries still work!
 - Script all changes and save them, *you will need them when you go live!*

Testing

- Watch out for unused Name_Security table entries (delete all un-needed rows in this table prior to upgrade, just remember to put back!)
 - A very full Name_Security table (entries with no login name/pw) will slow down your upgrade considerably

Scheduling

- Have users out by 4PM, begin the upgrade steps, done by 8PM or so (we had ASI assistance)
- The next morning you just need to install workstation components (manual task and still quite time consuming)
- Have a light day of testing and most issues are resolved by the following day

Post Upgrade Support/Training

- Great time to start using or trying IQA
- Spend some time on the new User Credentials tab
- Check for Crystal/IQA issues

Post Upgrade Support/Training

- Don't forget to upgrade 3rd party products (CSA, iEmail, Meeting Closer, etc.).
 - Obtain new product key ahead of time
 - Obtain latest version of each product
 - Install/upgrade latest version on the workstations as you install the workstation components
 - Change login to use Web Server not DSN

Summary

- Testing, testing and more testing!
- Make sure you factor in some budget for ASI/Solution provider assistance
- Communicate with your staff – involve them in the testing
- It's really not that different and nothing to be scared of.

Questions?