

Discovery Conference 2009

iMIS 15 Success Stories

Presented by David Humphreys, AIM Victoria & Tasmania



AIM VT and iMIS

- We've used a lot of iMIS
 - Customers, Dues, Events, Orders, AR, Certification, Marketing, Process Manager, iQA, etc.....
- Large-ish database (160,000 records)
- Some customisations (vouchers, event enquiry, student overview, consolidated invoice, automated certification)
- Been live since Q4 2006

Why did we do it?

- Because we had to!
- For .NET iBO
- To integrate with our new web site for real-time transactions
- AIM version policy

Licensing

- This is still a minefield
- We believe we were adequately licensed
- We are having to run on a temporary license while questions are resolved
- We are still unsure of next year's SUP
- Negotiate hard – ASI want you to upgrade!

How did we prepare?

- Created a test v15 environment in VMWare
 - Duplicate the database server and upgraded to v15
 - Upgrading took 3 attempts
 - Clean install of .NET much easier than reconnecting
- Got ASI in to redevelop our custom apps for .NET
- Detailed test plan drawn up
 - 100+ tests
 - Focused heavily on the customisations
 - Asked the BU's very nicely to participate!
 - Gave ourselves plenty of time!

How did it go?

- Really not too bad!
 - Testing had to be carried out multiple times – staff were very patient
 - Live on planned date
 - Minor issues with PayPal and firewall

Other things to consider

- Sort out your licensing now – Casual/Full
- It's not ASI's fault if you are under-licensed
- Document your iQA setup
- Talk to your users – regularly (especially Finance) – run training sessions
- Test, test, and test again
- Make sure you have some budget for help

What's it like?

- If you don't use Process Manager or Marketing Suite, for users it's much of the same – 15.1 introduces WCM
- User and general administration has changed somewhat for IT staff or system admins
- .NET iBO very easy to work with
- It's nothing to be scared of
- You will see the benefits in time!

If we had our time again?

- Test plan – better aligned for Finance reconciliation (retesting)
- Better documentation of BO customisations prior to upgrade

Questions?