

Discovery Conference 2008

Steps to the *iMIS* 15 Upgrade

Magic Steps!



Demographics

- How long have you had *iMIS*?
- Have you already purchased/acquired *i15*?
- Are you current on your SUP?
- What have you heard about *i15*?
- Why are you here?

Why should you upgrade?

- #1 Reason
- Bug FIXES
 - www.iMIS.com – Resolved Issues
 - 500 Resolved Issues
- Let's look at them....

New .NET Modules

- Public Users Events
- Public Users Orders
- Public Users Dues
- Public Users Customer Management

Public View Events

- Turning Event off automatically
- Break event registration into groups
- Misc Questions
- Ability to accept Purchase Orders

Public View Orders

- Master Products
 - e.g. Shirts with multiple sizes and colors show as one product on the front end, but map to numerous products on the backend.
- Multiple Categories

Public View Customer & Dues

- The good/bad/ugly.....

In short....

- If you have a customized e-Series site, and it is working for you, consider keeping it unless the new Public View Events and/or Orders offer you something you can't live without.
- If you are using e-Communities also consider keeping your existing e-Series
- HOWEVER.....

In short....(continued)

- If you don't have e-Series or it is out of the box or you are just tired of the current e-series.....then....
- Consider putting in the new Public .NET web views

Other Reasons to Upgrade

- New Features in 15.0.1
 - Business Object Designer (BOD/BOB)
 - Updated Word Integration
 - Batch Processing Enhancements

Other Reasons to Upgrade

- New Features in 15.0.3
 - Fundraising Security
 - Multiple Custom Tabs
 - Analytics upgrade (support for SQL 2005)
 - New Style Sheets for Public View
 - Numerous Opp & Marketing Suite Enhancements

New Licensing

- Named User not Concurrent user
- Applies to Back Office AND Web
- Required for a full web based app

Three User Types

- Full User
 - What you are currently do with iMIS concurrent users
- Casual User
 - New web view as well as limited access in desktop (Security Level 4 in Membership, 0 in AR/Cash and 2 in all other modules)
 - Same as the licensing for CRM Limited Customer users in *iMIS* 10
- Public user
 - A member or non-member logging into your site

Public User Count

- Short formula
 - # of Members = # Public Users
- Long formula
 - Consult ASI to determine the proper number of Public Users.....

Conversion Formulas

- Full Named Users = # of Concurrent Users * 1.2
 - Round up
- Public Users = # of Concurrent Users * 2,250
 - Move into correct block of licenses (see next slide)
 - If not currently licensed for e-Series – buy the user block required
- 1 Casual User per 10 Concurrent Users
 - No rounding up

Public User Blocks

- SQL Public View Blocks

1-7,500	7,501-15,000	15,001 - 25,000	25,001 - 50,000	50,001 - 75,000	75,001 - 100,000	100,001 - 150,000	150,001 - 300,000	Unlimited
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- MSDE/SQL Express Public View Blocks

1-6,000	6,001-12,000	12,001 - 18,000	18,001 - 24,000	24,001 - 30,000	30,001 - 35,000	35,001 - 50,000
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Conversion Costs

- Based on Public Users
 - 5% of the price of public user block
- Plus SUP fee of “free” Casual Users

Conversion Examples

- 5 SQL Concurrent Users w/ Web
 - $5 * 1.2 = 6$ Named Users
 - $5 * 2,250 = 11,250 = 7,500-15,000$ Public Users
 - Must pay 5% of the price of the 7,500-15,000 public view price for each of your web modules
 - No Casual Users

Conversion Examples

- 12 SQL Concurrent Users w/ Web
 - $12 * 1.2 = 14.4 = 15$ Named Users
 - $12 * 2,250 = 27,000 = 25,001-50,000$ Public Views
 - Must pay 5% of the price of the 7,500-15,000 public view price for each of your web modules
 - 1 Casual User offered (for 10+ users)
 - Must pay SUP fee on casual user to match current SUP Through Date

Conversion Examples

- 7 MSDE Concurrent Users w/o Web
- 5 CRM Limited User licences
 - $7 \text{ Concurrent} * 1.2 = 8.4 = 9 \text{ Named Users}$
 - 5 CRM = 5 Casual Users
 - No Public Views
 - No Casual User offer
 - No Fee for *i15* Software

Important Cost Considerations

- Software Update Plan (SUP) must be matched to current SUP
 - So if you have pre-paid your SUP and you add Casual users and/or new Full users, you must pre-pay the SUP on these new licenses as well

Important Cost Considerations

- If you do not have the Web Modules and wish to add them, there is an additional fee in addition to the Public Users module that you must pay

Conversion Challenges

- Find out how many people have logged into your db in the last month
 - `select * from users where LastLogin > dateadd(m,-1,getdate())`
- See how this compares with your conversion formula

ASI Says....

- 80% of clients will have no serious conversion costs issues
- 20% of clients will fall outside of the norm
- Example
 - CSI has a client with 19 concurrent users, but over 40 people have logged in during the last month

This is known as an

- Exception.....
- Per ASI
 - They do not want to lose clients over conversion costs so you should work with ASI on pricing and user requirements

But the fact is...

- If you have 2X the number of people logging in than you have licenses, you can expect to....
 - Pay some additional fees...
- And you should...
 - Consider some additional Casual licenses
 - Consider some staff using Full could be replaced by Casual

And Finally...

- ASI has stated, they do not want to lose customers over this conversion pricing....
- Work with your Solution Provider and/or ASI

i15 Hardware Recommendations

- Workstation
 - 1024x768 resolution (must have)
 - XP/Vista (2000 is supported just not recommended by CSI)
 - 2GB RAM (1GB is min, 2GB is recommended)
 - 2Ghz+ Processor

i15 Hardware Recommendations

- Two Servers Recommended
 - SQL
 - Application
- One Server Supported
 - SQL/Application
- Three Servers to be Supported/Recommended
 - SQL
 - Application
 - Public Users

*i*15 Server Hardware Recs

- See Handout
- PS – Remember no underscores in your server name.....

Upgrading

- Step #1 – Figure out who is doing it
 - If you have the time, technical bent, and don't mind some frustration, go for it!
 - If you just don't want to deal with it, have ASI or your trusted Solution Provider help (figure a minimum of 8 hours if you don't have e-Series)

Upgrading

- Step#2 – Figure out where to practice
 - You will want a server to practice the upgrade on (Remember, *iMIS* 15 Installations, START on the Application server, not the Workstation like 10.6!)
 - Consider using a Virtual Server

Upgrading

- Step#2 – Figure out where to practice (continued)
 - You will also need a test database
 - After upgrading, if you install the application on your desktop, your previous version of *iMIS* will no longer work *from your desktop!*

Go Do an Upgrade!

- See handout for invaluable *magical* steps

End of Show.....

- Now go practice your on your own
- And remember.....
- The *NiUG* listserv is your friend!
- And
- Don't be afraid to submit SMRs – ASI corrects and changes *iMIS* based on these responses alone.