



WEBINAR SERIES

iMIS Cloud 101 – Preparing for the Future

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
- Integration Bridges to nearly 90 third party vendors



HOSTED BY



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Moderator:

Richard Banks

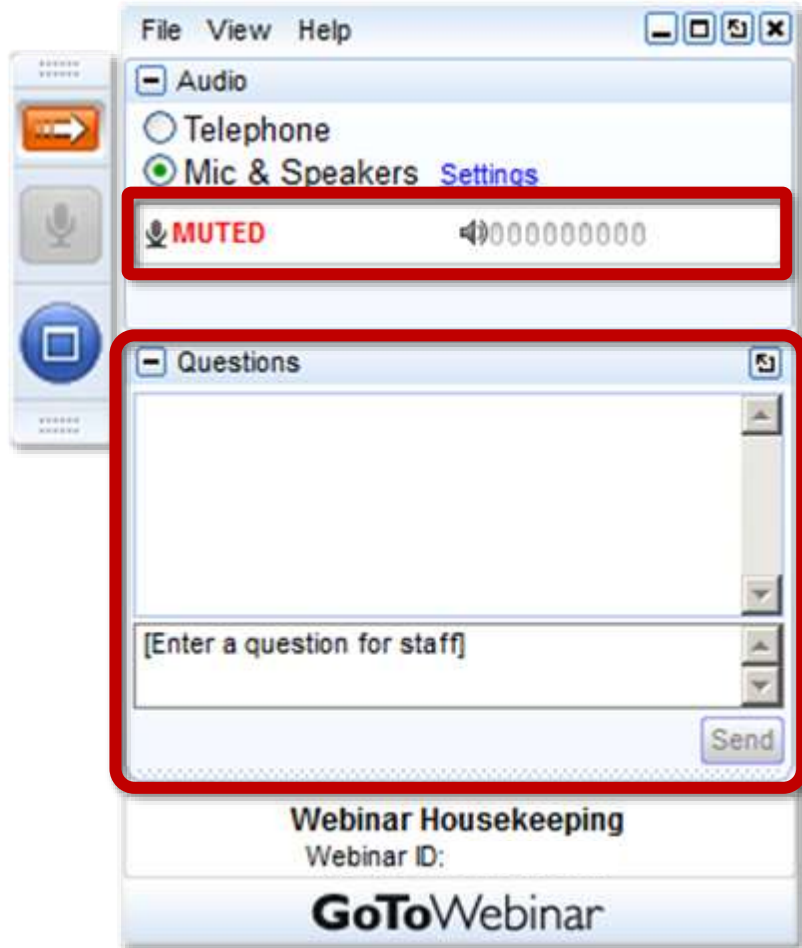
Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org





- Attendees are muted to reduce background noise
- Remember to ask questions via the **Questions** panel
- Questions will be answered during Q&A after presentation is complete

WHAT VERSION ARE YOU USING?

- Most existing clients are on iMIS 20
- iMIS Cloud will not be available to on-premise clients
- iMIS 2020 (20.4) is expected to be announced in the future for on-premise clients and will be a snapshot of the current version of iMIS Cloud



- Both iMIS Cloud and 20.4
 - No more desktop
 - Don't expect user defined/customizer tables. Panels instead
- Cloud
 - No access to SQL
 - No stored procedures
 - No triggers
 - No ability to install code, dlls on server



- Executive Discussion
- Assessment
- Develop Client Specific Migration Plan
- Budget for Migration
- Execute Pre-Migration Plan
- Execute Migration

EmilysQuotes.Com

When you find yourself in a hole,
quit digging.

~Will Rogers

- Things we need to stop doing
 - Stop creating Triggers
 - Stop creating Stored procedures
 - Stop creating SQL Views
 - Stop creating custom code that is not cloud friendly
 - Stop creating or editing Crystal Reports



- Use the staff site
- Create dashboards instead of reports
- Get training
- Clean up data
- Remove unused member types, products, etc.
- Making a plan to migrate in the next 1, 2, 3 years



- Meet with c-level staff to discuss the benefits and implications of migrating to iMIS Cloud
 - Total Cost of Ownership
 - Server maintenance and support
 - Security
 - PCI compliance
 - Accessibility – staff, BoD, members



- Identify and document Key Business Processes
- Database Review
 - Tables
 - Views
 - Stored Procedures
 - Functions
 - Triggers
 - Scheduled Jobs
- Reporting Tools
- Pricing rules for dues, events, and products
- Website
- Third Party Integration Review



- Identify key business processes
 - Mockup key business processes in iMIS Cloud to understand how they work
- SQL
 - Tables to Panels
 - Views to IQA's (Expression Builder)
 - Stored Procedures to Rest
 - Functions to Rest API's or Expression Builder
 - Triggers to Process Automation Plus
 - Scheduled Jobs to process Automation Plus
- Reporting – replace with dashboards or SSRS
- Third Party Integration/Bridges – make sure that they are cloud friendly today

- Conduct MoSCoW (Must Have, Should Have, Could Have, and Won't Have) analysis to identify system requirements and priorities
- Identify items that do not need to change
- Identify custom process that can be replaced with out of the box functionality
- Identify items that need to be converted to new processes (e.g., IQA, Process Automation Plus)
- Identify items that must be re-engineered (e.g., a dues process)
- Identify items that will be discontinued or don't need to be modified (e.g., an old Crystal Report)
- Identify Training needs

- Determine estimated cost to implement migration plan
- Determine effects on capital investments (short term and long term)
- Determine costs to do the work
- Estimate cost savings over time



- Coordinate timeline with client, ATS, and ASI for migration
- Sample:
 - Go Live Date/Time
 - Export and Backup
 - Specific Migration Plan tasks, dues, events, etc.
 - Scheduling
 - Budgeting
 - Approval
 - Assessment
 - Client Commitment



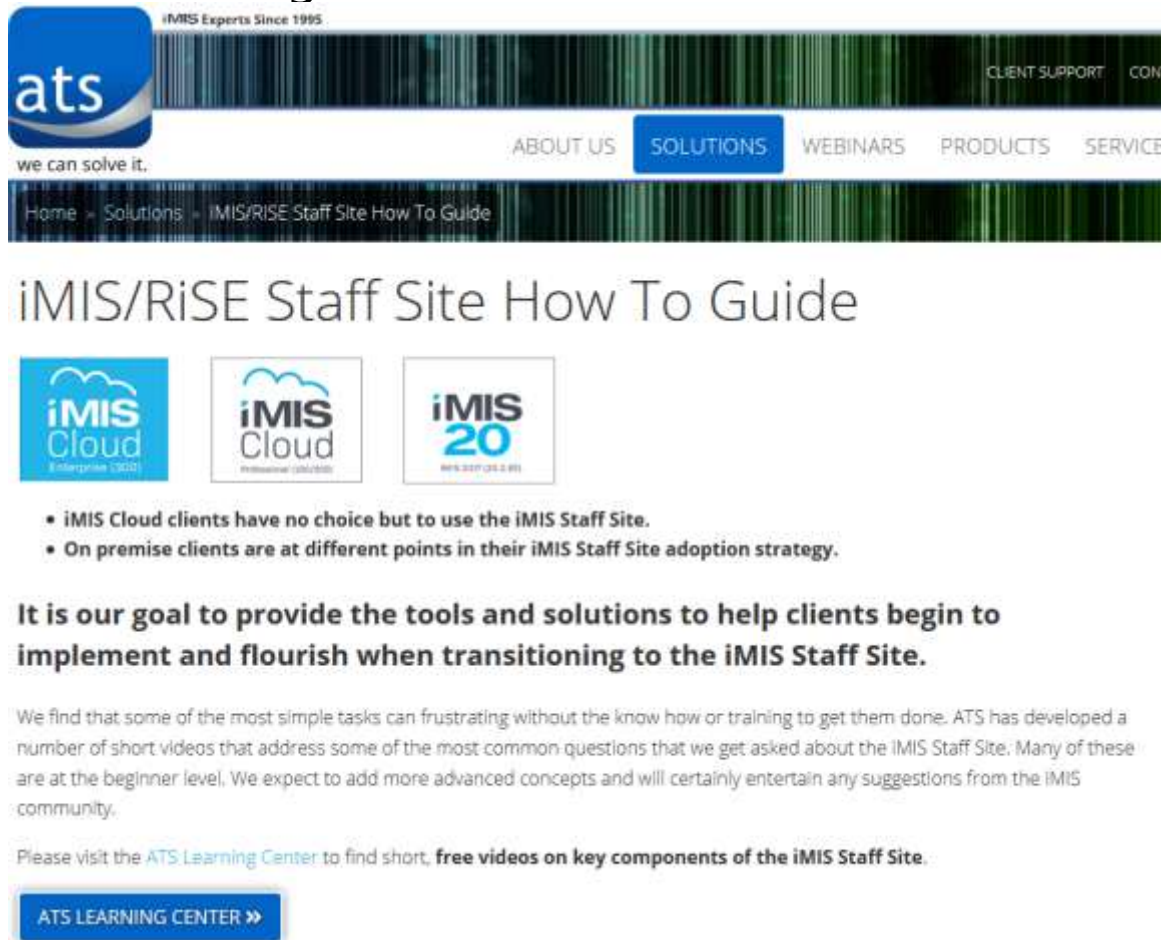
- Replace customizations, IQA's, stored procedures
- Create IQAs, etc.
- Export IQAs, etc.
- Create design templates
- Configure/setup third party integrations



- Perform final database modifications
- Coordinate migration with ASI Hosting
- Move database
- Apply templates
- Import IQAs, etc.
- Testing and go live
- Post Go Live Follow up:
 - Go Live +1 day
 - Go Live +7 days
 - Go Live +30
 - Go Live =??



- <https://www.atsol.org/StaffSiteHowToGuide>



The screenshot shows the ATS website header with the logo and tagline "we can solve it." The navigation menu includes "ABOUT US", "SOLUTIONS" (highlighted), "WEBINARS", "PRODUCTS", and "SERVICE". The breadcrumb trail reads "Home > Solutions > iMIS/RiSE Staff Site How To Guide".

iMIS/RiSE Staff Site How To Guide

Three iMIS product logos are displayed: iMIS Cloud Enterprise (2007), iMIS Cloud Professional (2010/2011), and iMIS 20 (2012/2013/2014).

- iMIS Cloud clients have no choice but to use the iMIS Staff Site.
- On premise clients are at different points in their iMIS Staff Site adoption strategy.

It is our goal to provide the tools and solutions to help clients begin to implement and flourish when transitioning to the iMIS Staff Site.

We find that some of the most simple tasks can be frustrating without the know how or training to get them done. ATS has developed a number of short videos that address some of the most common questions that we get asked about the iMIS Staff Site. Many of these are at the beginner level. We expect to add more advanced concepts and will certainly entertain any suggestions from the iMIS community.

Please visit the [ATS Learning Center](#) to find short, **free videos on key components of the iMIS Staff Site.**

[ATS LEARNING CENTER >>](#)



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Looking for more from the experts at ATS?

Upcoming Webinars

<http://atsol.org/Webinars>

schedule of upcoming webinars

Past Webinars

<http://atsol.org/PastWebinars>

*video recordings and downloadable
presentation slides*

Other Questions?

Email: info@atsol.org

Online: <http://www.atsol.org>

Phone: (720) 945-7252