VISUAL ANTIDOTE

iMIS Cloud Audit

ABC Association

Contents

Introduction

This document is a detailed analysis of The ABC Association iMIS environment for the purpose of upgrading to iMIS 20/20 Advanced and iMIS Cloud. This document will allow ABC to plan and prepare for their upgrade and migration to iMIS Cloud EMS.The process of upgrading to iMIS Cloud EMS includes the preparatory step of upgrading to iMIS 20/20 Advanced, on a server hosted with ASI.

This document covers the following components:

- iParts and Custom Controls
- Templates
- Database Tables, Views and Stored Procedures
- Custom Crystal Reports
- Event Pricing

iMIS 20/20 Advanced

iMIS 20/20 Advanced is meant as an intermediary between iMIS 2017 self-hosted and iMIS Cloud EMS. It allows clients to upgrade their iMIS instance to a similar version of iMIS as iMIS Cloud EMS, but remain on their own separate server (hosted by ASI). This version should be used as a stepping stone to iMIS Cloud EMS and will allow clients to continue using their custom database views, stored procedures and other "non cloud friendly" pieces while upgrading to the latest version.

While on this version clients should be replacing their non-cloud compatible components with those that are cloud friendly in preparation for moving to iMIS Cloud EMS.

Requirements for iMIS 20/20 Advanced:

- Clients must be on iMIS Version 2017
- Clients must convert from traditional to subscription license

iMIS Cloud EMS

iMIS Cloud EMS ensures the client is always using the latest version of iMIS without having to worry about upgrades or hosting. This version also does not allow direct access to the database, and all customizations must be client side using the REST API.

Overview

Below is an overview chart which displays the number of components which are not compatible with iMIS Cloud, and which of these are compatible with iMIS 20/20 Advanced.

Of main concern are

- Certification Module
- Number of Crystal reports
- Desktop Tabs not setup in Staff site

All four of these items will need to be rebuilt or updated before ABC can do the initial upgrade to iMIS 20/20 Advanced.

Once on iMIS 20/20 Advanced ABC can address the number of non-iMIS database objects (tables, views and stored procedures). These will need to be replaced with cloud friendly alternatives in order to move to iMIS Cloud EMS. More details on each of these items listed can be found in the following pages.

The items in green in the chart below will work on iMIS 20/20 Advanced, and their conversion can be done once ABC has upgraded. All items will need to be removed or updated in order to upgrade to IMIS Cloud.

Item	Number	iMIS 20/20 Adv.	iMIS Cloud
Custom iParts	12	FALSE	FALSE
Templates	2	FALSE	FALSE
DB - Tables	25	TRUE	FALSE
DB - Views	32	TRUE	FALSE
DB - Stored Procedures	15	TRUE	FALSE
DB - Functions	9	TRUE	FALSE
DB - Triggers	6	TRUE	FALSE
Crystal Reports	89	FALSE	FALSE
Event Registrant Classes	12	FALSE	FALSE
Forms	29	FALSE	FALSE

Also attached are the following two documents:

- ABC Additional Complexities Analysis.xlsx
- ABC Non-Imis Database Objects.xlsx

These reports are the results of SQL tools provided by ASI, which are used in this audit. Appendix A has documentation on how to read these reports.

Certification Module

ABC is currently using the Desktop version of the iMIS Certification Module. This version is no longer available in the iMIS 20/20 Advanced or Cloud EMS versions of iMIS. This module has been replaced with the Staff site version of the Certification Module first available on iMIS 2017.

In order to upgrade, ABC will need to first run the conversion tool (see link below) to migrate the data from their Desktop version of the Certification Module to the updated Staff Site version in iMIS 2017. This ensures that all data will be available in the Staff site after upgrading to iMIS 20/20 Advanced.

The Desktop version and the Staff Site version of the Certification Module do have some differences. We recommend ABC first test one of their programs using the new Staff site version on their current instance of IMIS 2017 to confirm it has all necessary functionality.

Conversion Tool - Migrating Certification Programs

https://help.imis.com/imis2017/Features/Certification/Migrating_certification_programs.htm

iParts and Custom Controls

Non-Cloud Friendly iParts

The following server side controls will not work on IMIS 20/20 Advanced or iMIS Cloud EMS. They will need to be rebuilt or converted to client side iParts using the REST API before upgrading.

Name	Location / Notes	Controls
Job Board	\va_iParts\Job Board	7
Photo Gallery	\va_iParts\Photo Gallery	1
Municipal Directory	\va_iParts\Custom\MunicipalDirectory	8
SAML SSO	\SAML	
Receipts	\va_iParts\Receipts.ascx	6
CPD Credits	\va_iParts\CPD_Credits.ascx	4

Forms

All of the Sonic Forms in iMIS 2017 will need to be converted to iMIS Forms in order to upgrade to iMIS 20/20 Advanced or iMIS Cloud EMS. Each form can take 2 - 4 hours to convert, depending on the complexity of the form. Below are the separate processes that uses iMIS forms and the number of forms we found in each

Process Name	Number of Forms
Application	6
Renewal	5
Registration	8
Election	4
Member Profile	4
Other	2
Total	**29**

Templates

The following templates will need to be rebuilt and converted to iMIS Cloud friendly templates using iMIS RiSE Theme Builder.

These templates may work on iMIS 20/20 Advanced with some minor adjustments, however we recommend updating them for iMIS 20/20 Advanced to ensure full functionality.

Name	File
ABC Member	ABC.Master
ABC Conference	CONF.Master

Database Tables, Views and Stored Procedures

Below are the database objects found in ABC's' database which are not part of the standard iMIS database. These tables, views and stored procedures will need to be removed in order to migrate to iMIS Cloud. They will not need to be removed in the iMIS 20/20 Advanced upgrade.

Once on iMIS 20/20 Advanced, views can be replaced with iMIS' new business object designer, stored procedures can be replaced with process automation plus webhooks (available Q2-3 2021), and custom tables can be replaced with iMIS' new stand alone tables.

The objects marked "Active" are those iMIS tools found to be referenced, and likely to be currently used, while the others did not appear to be "in use".

Note - Stored procedures that are directly used in custom controls and iMIS forms do not show as referenced in the ASI script but are currently in use.

SQL	
Tables	**Referenced**
ABC_EXPORT_TEMP	
ABC_IMPORT	
ABC_IMPORT_COUNC	x
ABC_Import_old	x
ABC_JobBoard_ContactInfo	x
ABC_JobBoard_Experience	
ABC_JobBoard_Job_Category	
ABC_JobBoard_Preferred_Job_Location	
ABC_Purchases	x
ABC_Voucher	
INFORMZ_PREFS	x
INFORMZ_SEQN	x
INFORMZ_SQL	x
Informz_Surveys	

INFORMZ_TRIGGERED_EMAILS	x
MAST	x
notes1127	
OR_NOTEtemp	
OrderCompany$	
orderNOTES	
OrderNOTES$	
ORDERNOTEStemp	
Orders11	
ABC_Apps	
ABC_Elections	
ABC_Votes	
tempARDET	
tempCO_Update	
tempDSMAST	
tempiDSMAST	
tempiMEMBER	
tempMEMBER	
tempREGIS09	
tempVoucher	
VA_AutoSubscribe	x
VA_ServiceProviderSettings	
VA_VoucherUsed	x
Voucher2017	
Stored Procedures	**Referenced**
GET_ACTIVITY_COUNTER	
GET_TARGET_GROUP_SQL	
GetRecordCount	
INFORMZ_CHANGE_STATUS	

INFORMZ_CREATE_PERS_SQL_FOR_VIEW	
informz_create_view_for_target	
INFORMZ_DROP_TARGET_VIEW	
INFORMZ_GET_AVAILABLE_MAILINGS	
INFORMZ_GET_BALLOT_ACTIVITY	
INFORMZ_GET_EMAILS_TO_SEND	
INFORMZ_GET_MAILING_ACTIVITY	
INFORMZ_GET_SURVEY_ACTIVITY	
INFORMZ_SAVE_BAD_EMAIL	
INFORMZ_SAVE_CHANGE	
INFORMZ_SAVE_CORRECT	
INFORMZ_SAVE_OPT_OUT	
INFORMZ_SAVE_RESUB	
INFORMZ_SAVE_UNSUBSCRIBE	
INFORMZ_SCHEDULE_TRIGGERED_EMAIL	
INFORMZ_SET_TRIGGERED_EMAIL_STATUS	
INFORMZ_TRANSFER_INITIAL_SUBS	
sp_ABC_Add_Member_Roles	
sp_ABC_Clear_ExpiredCarts	
sp_ABC80_Initialize	
sp_ABC80_Update	
sp_ABC80_UpdateByID	
sp_Job_DeleteExpired_GroupMemberDetails	
sp_Job_Update_ABC_ExportInfoList	
sp_ABC_ONLINE_APP_CREATE_S2_ALL_REQ_STAFF	
sp_ABC_ONLINE_APP_CREATE_S2_REQ_INSURANCE	
sp_ABC_ONLINE_APP_CREATE_S2_REQ_NP_UNDERTAKING	
sp_ABC_ONLINE_APP_CREATE_S2_REQ_OE_TRACKER	
sp_ABC_ONLINE_APP_CREATE_S2_REQ_PAYMEN	

T_MBR	
VA_CreateDuesWithDates	
VA_SearchAllTables	
VA_sp_VoucherReg	
Function	**Referenced**
CSVToTableWithID	x
fn_ABC_GetDescrGenTable	x
INFORMZ_CLEAN_PHONE	
INFORMZ_COMPARE_TIMES	
INFORMZ_FUNC_PERSONALIZATION	x
INFORMZ_GET_SECONDS_OF_DAY	x
INFORMZ_IS_SAME_DAY	x
StringSplit	x
Trigger	**Referenced**
InformzDeleteName	
InformzDeleteNameAddress	
InformzInsertName	
InformzInsertNameAddress	
InformzUpdateName	
InformzUpdateNameAddress	
VA_tbGroupMember_Unsubscribe	
Views	**Referenced**
ATS_Moodle_Canceled_Orders	x
Department	
v_ABC_SRA_CRA_General	
v_ABC_SRA_CRA_General	x
v_ABC_SRA_CRA_General	
v_ABC_SRA_CRA_Members	

v_Name_Log	
va_form_CompanyLookup	
vABC_DUES_ALL	
vABC_DUES_ALL	
vABC_Elearning_Not_Started	x
vABC_MEMBER_LANDING_PAGE_MANAGEMENT	
vw_GetCurrentDateTime	
vw_GetCurrentDateTime	
vwABC_CLOSE_RENEWAL	
vwABC_CLOSE_RENEWAL	
vwABC_RegisterRestriction	
vwABC_RegisterRestriction	
vwABC_RENEWAL_REPORT_YEAR	
vwABC_RENEWAL_REPORT_YEAR	
vwABC_ServiceProvided	
vwABC_ServiceProvided	
INFORMZ_VIEW_PERSONALIZATION	
INFORMZE_DEPT	x
vABC_DepartmentbyID	x
vABC_ExportInfo	x
vABC_OMD_CheckRoles	x
vABC_UserInfo	x
vw_ABC_Moodle_UnsynchedOrders	x
vw_ABC_Receipts	x
vw_ABC_Receipts_Orders	
ABC_1Subscribers	
ABC_2Subscribers	
ABC_3Subscribers	
ABC_4Subscribers	

Custom Crystal Reports

All iMIS standard out-of-the-box Crystal reports have been converted to SSRS reports and are available in both iMIS 20/20 Advanced and iMIS Cloud.

A total of 139 custom Crystal reports have been found on ABC's system. These reports will need to be rebuilt as IQA or SSRS reports to work on iMIS 20/20 Advanced and iMIS Cloud. ABC can also rebuild these Crystal reports using iMIS' new Report Writer tool once they are on iMIS 20/20 Advanced. Below is a complete list of these reports and the dates they were created.

We recommend that ABC review this list to determine which reports are still used by staff and create a plan to rebuild them in IQA or SSRS reports before migrating to iMIS 20/20 Advanced, or built using Report Writer after. Conversion of these reports can start prior to the migration to iMIS 20/20 Advanced, as IQA and SSRS reports built on ABC's current version of iMIS 2017 will work on iMIS 20/20 Advanced and iMIS Cloud

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ImisSystem	Category	Name	DateAdded
AR	Account Status	A/R Statements (Crystal)	2003-02-22 0:18:00
AR	Account Status	Trial Balance (Crystal) (TEST)	2010-09-22 4:09:00
AR	BatchControl Print	.Batch Report (Crystal)	2002-12-09 11:46:00
AR	BatchControl Print	Deposit Report	2002-12-09 12:34:00
AR	BatchControl Print	DepositSummary	2005-09-12 15:37:00
AR	BatchControl Print	OCAT Deposit Report	2003-10-08 11:43:00
AR	BatchControl Print	SWCF Deposit Report	2006-09-05 16:10:00
AR	Credit Card	PayPal Reconciliation Report (Crystal)	2012-01-24 12:04:00
AR	Trial Balance	Trial Balance (Crystal) Dues	2002-10-08 12:27:00
AR	Year End	Activity History	2003-10-08 11:47:00

AR	Year End	Dues 30 60 90	2003-10-08 12:00:00
AR	Year End	Dues 30 60 90.alpha.rpt	2003-10-08 11:57:00
AR	Year End	Dues Billed Alpha list	2003-10-08 12:07:00
AR	Year End	Dues billed by month	2003-10-08 12:11:00
AR	Year End	Dues Billed Complete	2003-10-08 12:28:00
AR	Year End	Dues Billed Supplement	2003-10-08 12:10:00
AR	Year End	Dues Distribution	2003-10-07 10:27:00
AR	Year End	Dues Distribution by Effective Date	2003-10-08 12:30:00
AR	Year End	Resigned Suspended Deceased	2003-10-08 12:32:00
COMMITTEES	Custom	Committee_Faxcover.rpt	2003-02-22 2:16:00
COMMITTEES	Custom	Past President Faxcover	2003-04-23 12:48:00
COMMITTEES	Labels	Custom Labels 5161	2003-10-31 15:56:00
COMMITTEES	Labels	Past President labels	2005-09-28 12:37:00
COMMITTEES	Rosters	Committee Roster - All Details	2003-02-15 0:37:00
COMMITTEES	Rosters	Committee Sign Up Sheet	2009-05-19 16:12:00
CUSTOMERS	Labels	Custom Labels by ID Avery 5161	2011-11-16 12:08:00
DUES	Billing	Dues AR 30 60 90 Firm	2011-12-01 15:58:00
DUES	Billing	Dues AR with email	2014-07-16 12:14:00
DUES	Billing	Dues Billed and Paid by Member Type	2011-12-01 16:10:00
DUES	Billing	Dues Billed by Month	2011-12-01 16:00:00
DUES	Billing	Dues Billed by Prodcut Code	2003-10-07 14:15:00
DUES	Billing	Dues Billed Complete	2013-04-01 14:04:00
DUES	Billing	Dues Billedand Paid by Member Type	2011-12-01 16:07:00
DUES	Billing	Total Dues Billing	2003-10-08 10:09:00
DUES	Renewal	1st Reminder Notice	2003-10-21 10:48:00
DUES	Renewal	1st reminder notice by id	2003-10-07 10:02:00
DUES	Renewal	Dues Billing OS by Type	2003-10-06 16:30:00
DUES	Renewal	Dues Final Reminder by ID	2013-01-27 12:33:00
DUES	Renewal	Dues Final Reminder notice	2013-01-27 12:31:00
DUES	Renewal	Dues Receipt	2003-12-19 12:36:00

DUES	Renewal	Dues Renewal	2003-10-07 8:49:00
DUES	Renewal	Renewal by ID	2003-10-07 9:58:00
DUES	Renewal	Renewal by Join Date	2003-10-07 19:43:00
DUES	Renewal	Renewal Notice	2003-10-06 16:43:00
DUES	Reports	Dues AR 30 60 90 by fimr	2011-12-01 15:34:00
MEETING	Badges	Badge Title Bottom	2010-10-13 11:23:00
MEETING	Badges	Badge Title Bottom Blank	2010-10-14 17:28:00
MEETING	Badges	Badge title bottom by ID	2010-10-14 15:33:00
MEETING	Badges	Dinner Badges with Table #	2003-05-14 17:12:00
MEETING	Badges	Dinner Badges with Table # by ID	2003-05-14 17:10:00
MEETING	Badges	EOT Badge by ID	2006-05-09 11:06:00

Event Pricing

Registrant class pricing is not available in iMIS 20/20 Advanced or iMIS Cloud. The following Registrant classes were found in ABC's iMIS events.

These will need to be replaced with pricing groups defined by IQAs in order to migrate to iMIS 20/20 Advanced. This will need to be done for active events and future events. Past events which are no longer available for registration will not have to be converted.

Note: N and NM registrant clases come predefined as groups in iMIS 20/20 Advanced and iMIS Cloud

CODE	DESCRIPTION
CORP	Corporate Training
GROUP	Group Rate
M	Member
NM	Non Member
AM	Affiliate Member
APM	Affiliate Professor Member
ASM	Affiliate Student Member
COMP	Complimentary
EX	Exhibitor
GUEST	Guests
RET	Retired Member
RM	Regular Member
SP	Speaker
SPEC	Special Pricing
SPONS	Sponsor
SPSE	Spouse
STAFF	Staff
STU	Student non Member
VIP	VIP

Appendix A - Documentation

Below is documentation from ASI. This is a guide to read the data supplied in the report: *ABC Non-Imis Database Objects.xlsx*

There are a total of five result sets: The first is a single row summary about this database.

The second lists all the customizations that were found, with a final column being SQL that will drop the customization (DO NOT JUST BLINDLY RUN THIS SQL).

The third result-set is a list of all customizations that don't seem to have any references. These are safe to just drop, and the SQL to do so is listed in the final column ready to be copied and pasted. The fourth result-set is a list of all customizations that are being referenced, including information about what is referencing it.

The fifth and final result-set is a list of BOs that won't properly upgrade because they reference tables that don't exist or are being removed.

ABC Additional Complexities Analysis.xlsx

Each of the spreadsheets contain a specific set of data (drawn from a client's iMIS DB) that may be useful in analyzing the likelihood of one or more complexities that may be encountered during upgrade to either iMIS Cloud or to iMIS 20.4. The following summaries are intended to assist with the analysis of the results.

Each of the result sets will generally contain the same first three to four (3-4) columns. These are values that are intended to differentiate between results for different DBs on the same server.

> **DataCollection** - This is an identifier of the data results set from the SQL script

> **Server** - This is an identifier of the SQL Server from which the row was returned

> **DBName** - This is an identifier of the DB from which the row was returned

> *---- DBVersion is not included on every tab*

> **DBVersion** – This is an identifier of the iMIS Version of the DB from which the row was returned

General Counts

This is a list of various counts that have been identified as indicators of potential complexity. Please note that a large/high value does not necessarily mean there is anything wrong or particularly complex. These values are raw counts based on criteria described below. The intent here is to identify where a client might want to investigate a bit further to see if any of the values do, in fact, indicate a potential issue.

BillingRuleSets (E,F,G) - counts of the number of Billing pricing rules defined in the system

> **TotalBillingRuleSets** – the total number of pricing rules defined for Billing

> **SmallestBillingRuleSet** – the smallest number of pricing rules defined by any Billing Item

> **LargestBillingRuleSet –** the largest number of pricing rules defined for any Billing Item

BillingCaseStatements – count of Billing pricing rules that appear to be CASE statements

These are the most likely to be easily migrated using the new BOD Expression Builder.

BillingOtherFormulas – count of Billing pricing rules that are not CASE statements and do not appear to reference a column from the Name_All view as the source

These are likely to reference either a stored procedure, direct SQL logic, or some other combination of values that (if still being used) will need to be addressed in some different way after the upgrade.

EventRuleSets (J,K,L) - counts of the number of Event pricing rules defined in the system

> **TotalEventRuleSets** - the total number of pricing rules defined for Events

> *These are generally going to include every instance of a Registrant Class for which pricing is defined for each Event Function. So, the more Registrant Classes and Event Functions, the larger this number will be.*

SmallestEventRuleSet – the smallest number of pricing rules defined for any Event Function

LargestEventRuleSet - the largest number of pricing rules defined for any Event Function

Again, it is worth remembering that this will likely be determined by the number of Registrant Classes defined since an Event Function that has pricing defined for every Registrant Class will have that number of rules.

TotalRegClasses – the total number of Registrant Classes defined in the system

This value can be an insightful number if it is rather large. In some cases, this might be driven by the number of Member Types the organization has if they are using Member Type pricing for Events. However, if this number is large, it is worth investigating the pricing rules defined for those Events with the largest number of RuleSets.

If each Registrant Class has different pricing defined, the migration could require more effort to create new Event Pricing Groups to accommodate the level of granularity to which the organization is accustomed.

SalesRuleSets (N,O,P) - counts of the number of Sales pricing rules defined in the system

TotalSalesRuleSets - the total number of Sales Items with pricing rules defined

SmallestSalesRuleSet – the smallest number of pricing rule steps defined for any Sales Item

LargestSalesRuleSet - the largest number of pricing rule steps defined for any Sales Item

TotalFinancialEntitites – count of the total number of financial organizations defined in the system

Funds – count of how many of the TotalFinancialEntities are marked as Funds

TotalDueToDueFromRules – count of how many DueToDueFrom rules are defined

General Ledger Accounting Interface (T,U,V,W) - these values are intended to provide some insight into the client's use of an external general ledger accounting system.

GLAccountingPackage – the designation of the GL Accounting software package used by the client

Note: this will often be Generic and won't specifically identify the actual package

LastGLexport – the date the last GL Export was run

Note: this is only updated if the export is run using the iMIS GL Export interface

GlPath – the system configured path (if specified) to the location of the GL Export files

Note: this value may not be populated. If not, a user would be prompted for the path at the time they run the GL Export. If it is populated, the name of the export file included in this path may help identify the GL Accounting Software package used.

GlConvPath – the system configured path (if specified) to the location of a GL Interface Conversion program that reformats the Generic iMIS GL Export file into a different file format compatible with a specific GL Accounting software package

Note: a value in this field is a likely indicator that the client uses an external (i.e., non-iMIS) tool to transform the generic iMIS GL Export file. This external program may need to be updated to work with the new export format created by iMIS on the web.

Staff and Public website analysis (X,Y,Z,AA,AB,AC) - these values are primarily intended to provide some insight into how much the client has been using new RiSE website functionality for Staff and public users

TotalStaffSiteBatches - number of Accounting Batches created via the Staff Site in the last 6 months

Note: this is a potential gauge for whether or not an organization is actually using either the Staff Site or any Public Site for the transaction of commerce. A value of zero (0) is a good indicator that the organization might only have ever used AAC/Desktop.

TotalStaffUsers – number of Staff User accounts defined in the system

Note: this does not distinguish between active and former Staff users

StaffLoginsPastYear – number of TotalStaffUsers that have logged in to the system in the last 365 days

Note: this will not necessarily indicate how active Staff users are in terms of using the Staff site since a log in via the AAC/Desktop will also be counted.

PublicWebsites – number of all non-Staff websites defined in the client system

Note: this does not distinguish between websites which are published/active and those which are not.

TotalPublicUsers – number of non-Staff users defined in the system

PublicUserLoginsPastYear – number of TotalPublicUsers that have logged in to the system in the last 365 days

TotalCustomIndexes (AD)–number of custom indexes (max 4) that have been defined

CustomSQLInReportSpecs (AE) – number of non-standard custom SQL routines defined in the Report Specs

Custom Crystal Reports analysis (AF,AG,AH) - these are a series of counts that simply attempt to identify Crystal Reports' level of usage in the client's system. A Crystal Report would most likely be referenced in the ReportSpecs that were used from within AAC/Desktop. However, the counts from the Web Document System are included as well.

Note: not all Crystal Reports should need to be recreated in order for a client to upgrade. Some of the reports identified here may no longer be used by the client or may have been replaced by SSRS reports after the upgrade.

CustomCrystalReportsInReportSpecs – number of non-standard Crystal Reports defined in Report Specs

CustomCrystalReportingServicesTemplates – number of non-system Crystal Reporting Services Templates defined in the Document System

CustomCrystalReportingServicesReports - number of non-system Crystal Reporting Services Reports defined in the Document System

ActivityRecordsWithZeroSEQN – number of Activity table records with SEQN = 0

Note: this number should always be zero (0). However, an error of unknown origin has been identified in some legacy systems so this count is included to identify this issue as early as possible.

ResourceCodeConflicts – number of rows in the Meet_Std_Resrc table where the upgrade will likely cause a conflict due to a change in how Event Resources are defined in iMIS Cloud Enterprise or iMIS 20.4

Previously, Event Resources had three tiers of hierarchy (Type, Group, and Code). In the new schema, Event Resources has only two tiers - Type and Code. This can result in conflicts that have been found to interfere with some client's custom Event Resource reports. If the script returns a non-zero value, additional testing may be required to ensure that these conflicts do not cause similar issues.

TotalNameRecords – number of Name records in the system

TotalNameAddressRecords – number of Name_Address records in the system

TotalActivityRecords - number of Activity records in the system

TotalTransRecords - number of Trans records in the system

TotalOrdersRecords - number of Orders records in the system

TotalInvoiceRecords - number of Invoice records in the system

TotalSubscriptionsRecords - number of Subscriptions records in the system

TotalMeetingCodesWitSpecialCharacters –number of Meet_Master records where the MEETING value contains a disallowed special character

Note: specific special characters are not allowed in the Meeting Code value for Events defined or edited after upgrade. While documentation has, for years, warned against including specific special characters in any code codes in AAC/Desktop, it was not prohibited and therefore will cause an issue after the upgrade.

While it is not a problem for viewing and registering for Events defined with specific special characters in the code, any attempt to edit such an Event after upgrade will fail due to existing validation rules. Therefore, it is best to identify these prior to the upgrade. ASI's Cloud Transition Team has a preliminary script that can be run to remove these specific special characters if a critical Event is identified with this need.

TotalEventProductCodesWithSpecialCharacters - number of Event Function Product records where the PRODUCT_CODE value contains a disallowed special character

Note: specific special characters are not allowed in the Function Code value for Events defined or edited after the upgrade. While documentation has, for years, warned against including specific special characters in any code codes in AAC/Desktop, it was not prohibited and therefore will cause an issue after the upgrade.

While it is not a problem for viewing and registering for Event Functions defined with specific special characters in the code, any attempt to edit such an Event Function after upgrade will fail due to existing validation rules. Therefore, it is best to identify these prior to the upgrade. ASI's Cloud Transition Team has a preliminary script that can be run to remove these specific special characters if a critical Event is identified with this need.

Custom Indexes

If the **TotalCustomIndexes** on the **General Counts** tab returned a non-zero value, then this tab should contain the details of those Custom Indexes. These were defined to enable staff users to perform searches on up to four additional fields from standard Contact tables in AAC/Desktop.

Note: many of these are values that are already indexed and searchable on the web and do not require any further analysis (e.g., Email, City, StateProvince). Most Panel Data Source properties will also be able to be indexed for faster searching. However, we have identified some values from Customizer tables that might warrant further discussion with clients due to privacy concerns (e.g., SSN).

Billing Pricing Rules

If either the **BillingCaseStatements** or **BillingOtherFormulas** on the **General Counts** tab returned a non-zero value, then this tab should contain additional details about the actual SQL logic (or other non-standard source field) specified for those Billing Pricing Rule Sets.

These results should be examined for compatibility with newer BOD Expression Builder approaches and use of other RiSE tools to replace them. In cases where complex pricing rules cannot be replaced with newer web-safe approaches, the client may need to wait to upgrade until additional tools can be developed.

Custom SQL in Report Specs

If the **CustomSQLInReportSpecs** on the <u>**General Counts**</u> tab returned a non-zero value, then this tab should contain additional details about the actual SQL logic contained in Report_Desc table.

Note: the formatting of the value in the SQLLogic column of this tab will likely contain lots of extra white space due to the SQL editor that was supported in AAC/Desktop. However, the logic in this tab should be reviewed with the client to determine whether any of these procedures are still used. The Title and Description columns may help to understand the original purpose of these procedures.

Custom Crystal in Report Specs

If the **CustomCrystalReportsInReportSpecs** on the <u>**General Counts**</u> tab returned a non-zero value, then this tab should contain additional details about the actual Crystal reports contained in Report_Desc table.

Events with StoredProc Pricing

If any of the Events defined in the client system reference a custom SQL Stored Procedure used as the source of the Registrant Class determination, this tab should contain the Meeting Code, Title, and the name of the Stored Procedure.

These results can be cross-referenced with the results of other scripts that identified SQL Customizations (e.g., triggers, stored procedures, functions, tables, and views) in the client DB. Since these stored procedures will not be supported on the web, alternate means of using Event Group Pricing Rules will need to be adapted to achieve equivalent results.

Meeting Resource Code Conflicts

In iMIS Cloud Enterprise, we've altered the way that Meeting Resource Codes work. One adverse effect of the change is that previous versions of iMIS allowed duplicate CODE values that could now result in primary key violations for certain Resource Type/Resource Group combinations. This is a situation that ASI has only encountered once and was able to develop a script to eliminate the duplicates after upgrade. However, if this script returns any results, it would be best to remedy those prior to upgrading.

System Params

The results of this script will identify any Parameters and Values (both ShortValue and LongValue) that are not defined among the ones that ASI has intentionally addressed in iMIS Cloud Enterprise or iMIS 20.4.

Note that many of these will indicate involvement with a 3rd-party developer application that may need to be refactored to use the new REST API. Others may indicate obsolete settings that are either no longer supported or relate to legacy features that are no longer supported. If any of the settings suggest involvement of a key component/feature of iMIS that does not yet exist in the new version, contact the ASI Cloud Transition Team.

Client Licenses

The results of this script will identify one row for each client DB indicating which License Keys are contained in their iMIS license. These results should be examined primarily for any indication of a licensed product that the client might be using that is either no longer supported or which might require more discussion before considering them as a candidate for upgrading.

*The existence of any of the licenses with a dark gold header should warrant some additional examination. The existence of an **Xtender** license is a possible indication that the client has, at some point in the past, had an Xtender application integrated with their iMIS Desktop application.*