IMIS EMS UPGRADE ANALYSIS

**MUST-DO BEFORE YOU BEGIN**

You must have a version of the database on iMIS 2017 (20.2.66) with the latest service pack applied. When the database is available, run the following scripts:

* [ListNonImisDatabaseObjectNames](https://support.imis.com/hc/en-us/articles/360034834331%22%20%5Ct%20%22_blank) – This is the script that returns the list of customizations.
* [AddlComplexities](https://support.imis.com/hc/en-us/articles/360034010312-Additional-Complexities) – This is the script that returns all additional complexities. Read the ReadMe before running the script.

**BASICS**

* **Client Name**:
* **Current version**:
* **Primarily uses iMIS Staff site?**Y/N
* **Has ILS?** Y/N
* **Customizations needing replacement**:

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| --- | --- | --- |
| **Type** | **Name** | **Business Purpose** |
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* **Third-party integrations**:
* *Third-party product name 1*
* *Third-party product name 2*
* *Etc.*
* **Needs PIAS for post-upgrade goals?** Y/N

**ADDITIONAL COMPLEXITIES**

* **Billing case statements needing replacement**:
* *Billing product name 1*
* *Case statement details*
* *Billing product name 2*
* *Case statement details*
* *Etc.*
* **GL package used**:
* **Crystal Reports needing replacement**:
* *Name of report 1*
* *Name of report 2*
* *Etc.*
* **Uses fundraising source codes?** Y/N
* If yes, will need list with correlating funds/gift items
* **Has custom account pages?** Y/N
* **Any other complexities identified after running script?**