

Discovery Conference 2009

# Introduction Bruce Drury

IServices Consulting



# Topic Overview and Agenda

- Part 1 About the iMIS Customiser
- Part 2 How to use the iMIS Customiser
- iMIS 15 vs. iMIS 10
- Tutorial sheet
- Questions

# What is the iMIS Customiser?

- CRM Functionality
- Adds further attributes to contact record

# What do you use it for?

- Recording additional information for internal use
- Web access via eSeries and Public User
- Billing rules e.g. number of staff

# User examples

- Special interests
- Communications preferences
- Demographic
- Education qualifications
- Volunteer's details

# Who should use it?

- System Manager
- Database design knowledge

# Pitfalls

- Not documented
- Over use
- Too many tabs
- Duplicate data
- Unused tabs
- Informs and multi instance fields

# Design Stage

- Importance of proper design
- Design before you build
- Document requirements for future reference
- Test the design
- Check appearance in eSeries or Public User

# Example Design Document

## IMIS Customiser Specification and Documentation

The following documents the user defined tables and fields in the IMIS setup.

### Custom Table Specification

The following provided the expected file layout and fields for the custom tables required. The custom window in IMIS will display the fields of this table.

#### Name Cadet

Table = CadetInfo

System = Membership

Access Method = ID

Multiple Instances Allowed = No

Always create = No

	Field Name	Prompt	Validation	Type	Length	Format	Multi	Purpose
1.	OccupationalStream	Occupational stream:	Gen lookup	Char	100	As typed	No	
2.	CapitalCity	Preferred capital city:	Gen lookup	Char	25	As typed	No	
3.	RelocateOption	Relocate option:		Check box		As typed	No	
4.	Institution1	Institution:		Char	100	As typed	No	
5.	QualType1	Qualification type 1:		Char	100	As typed	No	
6.	AssociatedMajors1	Associated Majors 1:		Char	100	As typed	No	
7.	CompDate1	Completion Date 1:		Char	100	As typed	No	
8.	Institution2	Institution:		Char	100	As typed	No	
9.	QualType2	Qualification type 2:		Char	100	As typed	No	
10.	AssociatedMajors2	Associated Majors 2:		Char	100	As typed	No	
1.	CompDate2	Completion Date 2:		Char	100	As typed	No	
2.	Employer1	Employer 1:		Char	100	As typed	No	
3.	JobTitle1	Job Title 1:		Char	100	As typed	No	
4.	EmployedPeriod1	Employed Period 1:		Char	100	As typed	No	
5.	EmploymentType1	Employment Type 1:	Gen lookup	Char	50	As typed	No	
6.	Employer2	Employer 2:		Char	100	As typed	No	
7.	JobTitle2	Job Title 2:		Char	100	As typed	No	

# Create Table – Step 1

**User Defined Tables**

New Open Edit Delete Find

Table Name: marketing\_prefs System: Access Method:  Multiple Instances Allowed  
 Always Create  
Only applies to these types:  Use for Dues Pricing

Up  
Down  
Insert Line  
Delete Line

Print Create/Update Server Table Auto-Create Window Save Cancel

# Create Table – Step 2

**User Defined Tables**

New Open Edit Delete Find

Table Name: Name\_Cadet System: Membership Access Method: ID

Multiple Instances Allowed  
 Always Create  
 Use for Dues Pricing

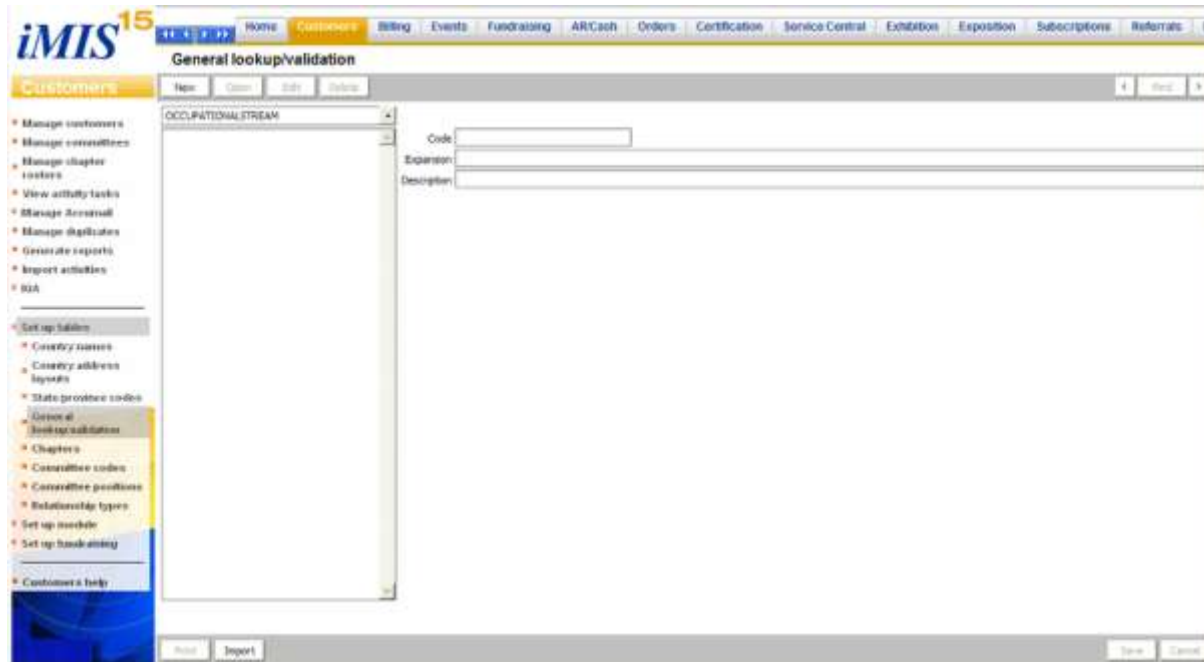
Only applies to these types: [Empty]

Field Name	OccupationalStream	Type	Char	Length	100	Dec	
Prompt	Occupational Stream:	Format	<input checked="" type="radio"/> as typed <input type="radio"/> upper case <input type="radio"/> upper/lower				
Validation	OCCUPATIONAL_STREAM	<input type="checkbox"/> Multi Select					
Field Name	CapitalCity	Type	Char	Length	25	Dec	
Prompt	Preferred Capital City:	Format	<input checked="" type="radio"/> as typed <input type="radio"/> upper case <input type="radio"/> upper/lower				
Validation	CAPITAL_CITY	<input type="checkbox"/> Multi Select					
Field Name	RelocateOption	Type	CheckBox	Length	2	Dec	
Prompt	Relocate Option:	Format	<input checked="" type="radio"/> as typed <input type="radio"/> upper case <input type="radio"/> upper/lower				
Validation		<input type="checkbox"/> Multi Select					

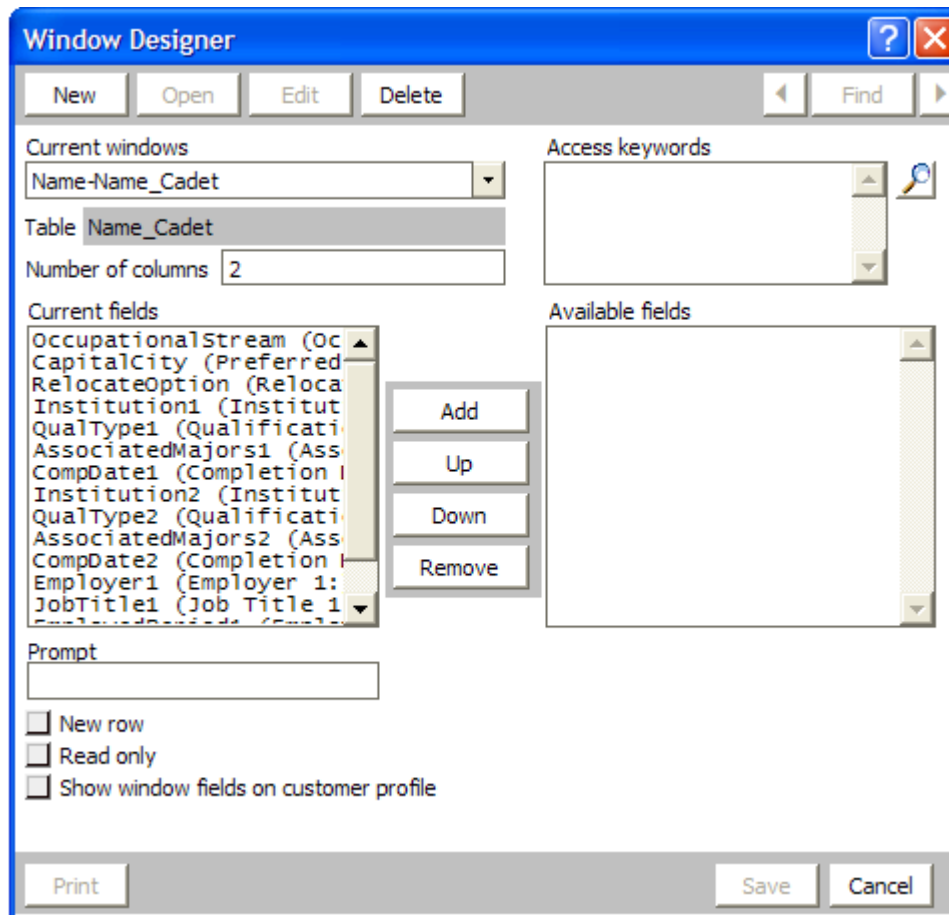
Up Down Insert Line Delete Line

Print Create/Update Server Table Auto-Create Window Save Cancel

# Create Validation Tables



# Create Windows



# Create Tabs

Custom Tab Designer

New Open Edit Delete Find

Custom tab name: new\_tab

Number of columns: 2

Current fields:

- Name.FULL\_NAME (FULL\_NAME)
- Name.MEMBER\_STATUS (MEMBER\_STA
- Name.MEMBER\_STATUS\_DATE (MEMBE
- Name\_Cadet.AssociatedMajors1 (
- Name\_Cadet.AssociatedMajors2 (

Access keywords:

Available tables: Name\_Cadet

Available fields:

- CapitalCity (Preferred Capital
- CompDate1 (Completion Date 1:)
- CompDate2 (Completion Date 2:)
- EmployedPeriod1 (Employed Perio
- Employer1 (Employer 1:)
- EmploymentType1 (Employment Typ
- Institution1 (Institution:)
- Institution2 (Institution:)
- JobTitle1 (Job Title 1:)
- OccupationalStream (Occupationa
- QualType1 (Qualification Type 1
- QualType2 (Qualification Type 2
- RelocateOption (Relocate Option

Prompt: Years Member:  New row  Read only

SQL string: DATEDIFF(year,Name.Date\_Added,GETDATE())

Print Create SQL field Custom tab name Save Cancel

# Activating Windows and Tabs

**Manage customers Member - MANAGER**

ID: 2 Member Active

Profile Status Notes Picture Financial Other

Work Phone  
Home Phone  
Fax  
Toll Free  
E-mail  
Web Address

Profile  
Status  
Notes  
Picture  
Financial  
Other  
Edit Tab Preferences Ctrl+T

Address  
Address 1  
Address 2  
Address 3  
City State Postcode  
Country  
Phone Fax  
E-mail

Results Record History Activities-All Calls Letters Roster AR/Cash Billing Events Orders Exhibition Exposition Certification Relationships Fundraising Matching

ID	Last Name	First Name	Middle Name	Suffix	Title	Company	City	State	Member Type	Co
▶ 2		MANAGER							M	

New Delete Find Print User Credentials Save Cancel

# Security Considerations

- Member Types
- Staff Types

# Tutorial Sheet

- Quick Start Guide
- Available at [www.iservices.com.au](http://www.iservices.com.au)

# Questions