

Process and Automation

Automating your processes using iMIS Task Centre

Introduction

About
Task
Centre

Jay McCormack

Scheduled
Reporting

Big
Donation
Tickler

Automated
Billing by
Email

What to Automate?

- EVERYTHING!
- Process Map First, then automate
- Is their discretion involved?
- Cost and Return

General Process

- When does the task begin
- What reports are used
- What raw data is used
- What variables are required
- What decisions are made
- What outcomes are required

What is Task Centre

- Process Manager

Tells people what they need to be doing

- Task Centre

Automates the things that the people need to do

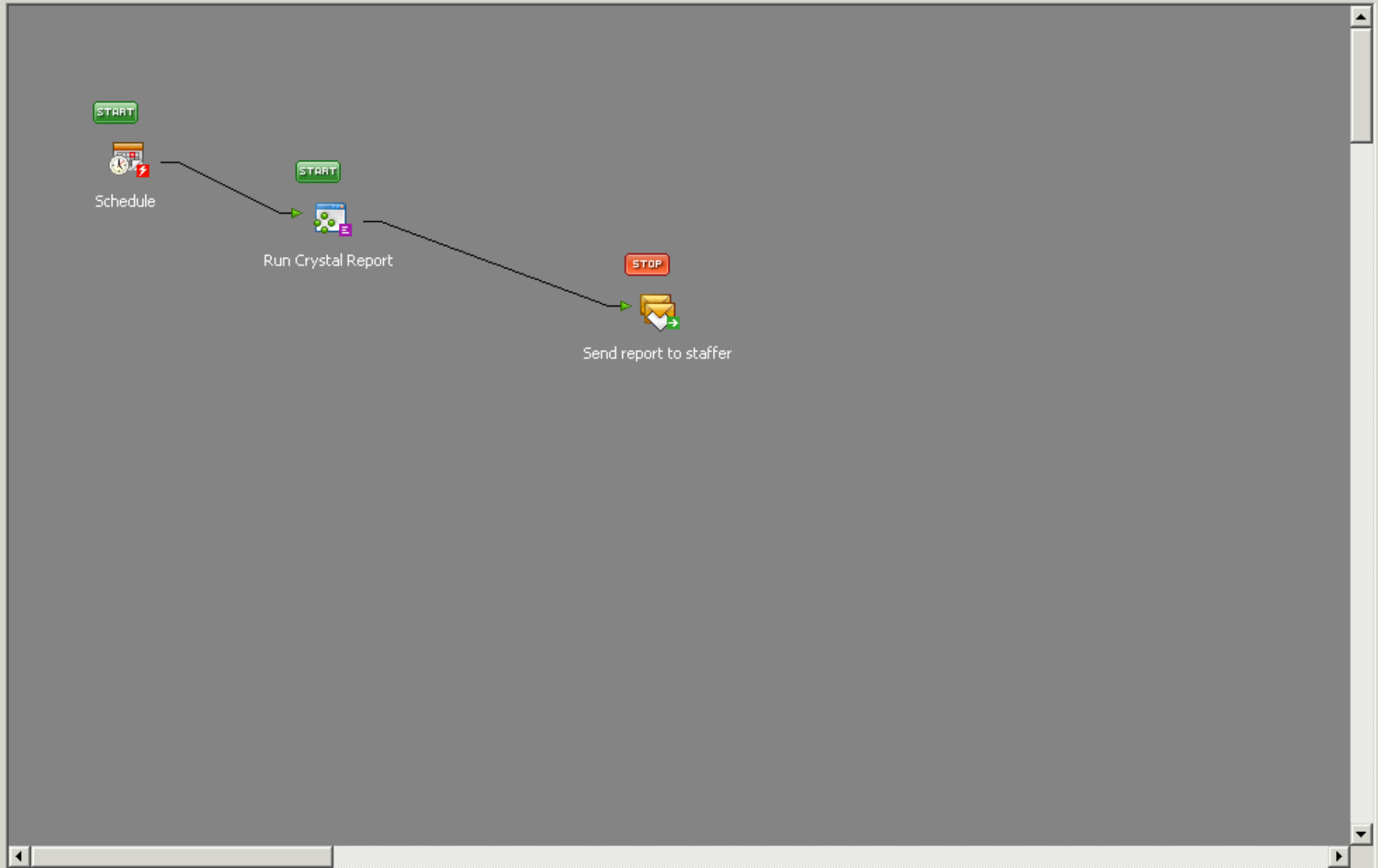
Licensing

- Licensed by Users and Tasks
- Connects to one database
- Support through ASI
- Contact your customer care manager for more information

The Password

- The password, if prompted is

manager



Task Centre Elements

- Events – Schedule, Trigger, SMTP
- Inputs – Raw Data, Stored Procedure
- Formats – Text, HTML, Crystal Report
- Outputs – SMTP, Print, Save As, FTP, SP
- Execute – Program, SP, COM, VBS
- General – Decision, Parse, Data Filter

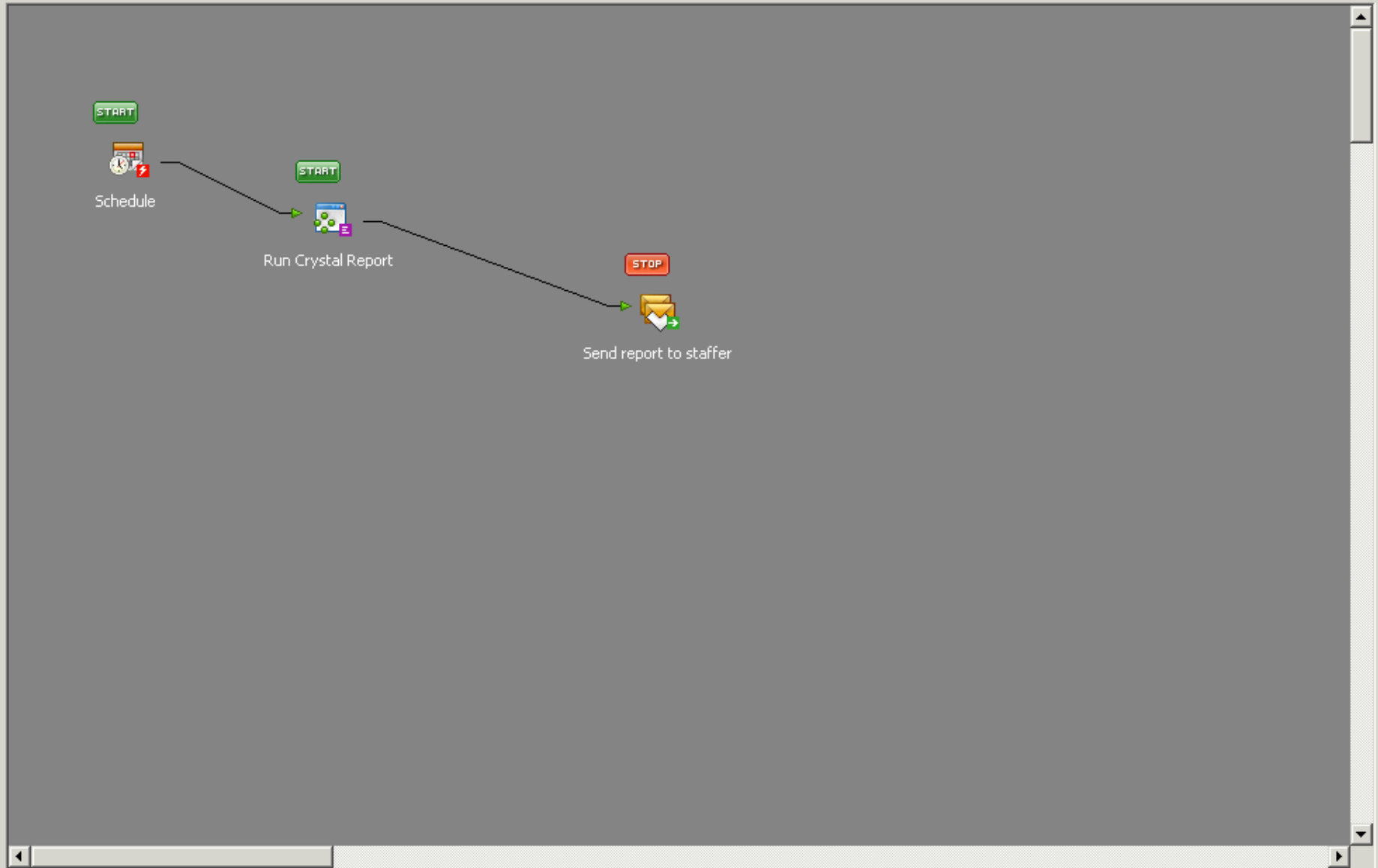
Scheduled Reporting

Send the membership report to Fred
on the 1st of every month



General Process

- When
 - 1st of the Month
- Reports
 - Member Report
- Raw data
 - None
- Variables
 - None
- Decisions
 - None
- Outcomes
 - Email & PDF



Task Elements

- Schedule
- Run Crystal Report
 - MemberIndex.rpt
 - Change DB Details in the report
- Send Email
 - Using document (as PDF) from the report

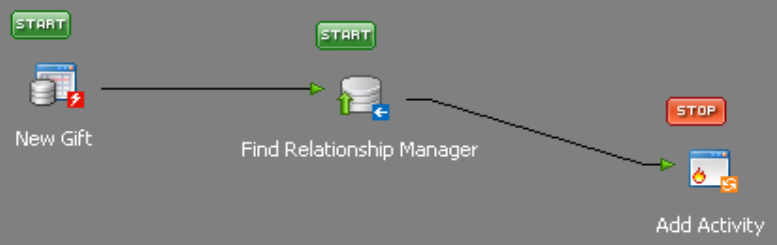
Big Donation Tickler

Notify Relationship Manager of Gift
over \$1,000



General Process

- When
 - Gift > \$1000
- Reports
 - None
- Raw data
 - Relationship Manager
- Variables
 - ID of Donor
- Decisions
 - None
- Outcomes
 - Activity



A Note About Triggers

- Two temporary tables are available in triggers
 - Old data is stored in DELETED
 - New data is stored in INSERTED
- Fields are referenced as
 - INSERTED.MEMBER_TYPE, not
 - NAME.MEMBER_TYPE

Task Elements

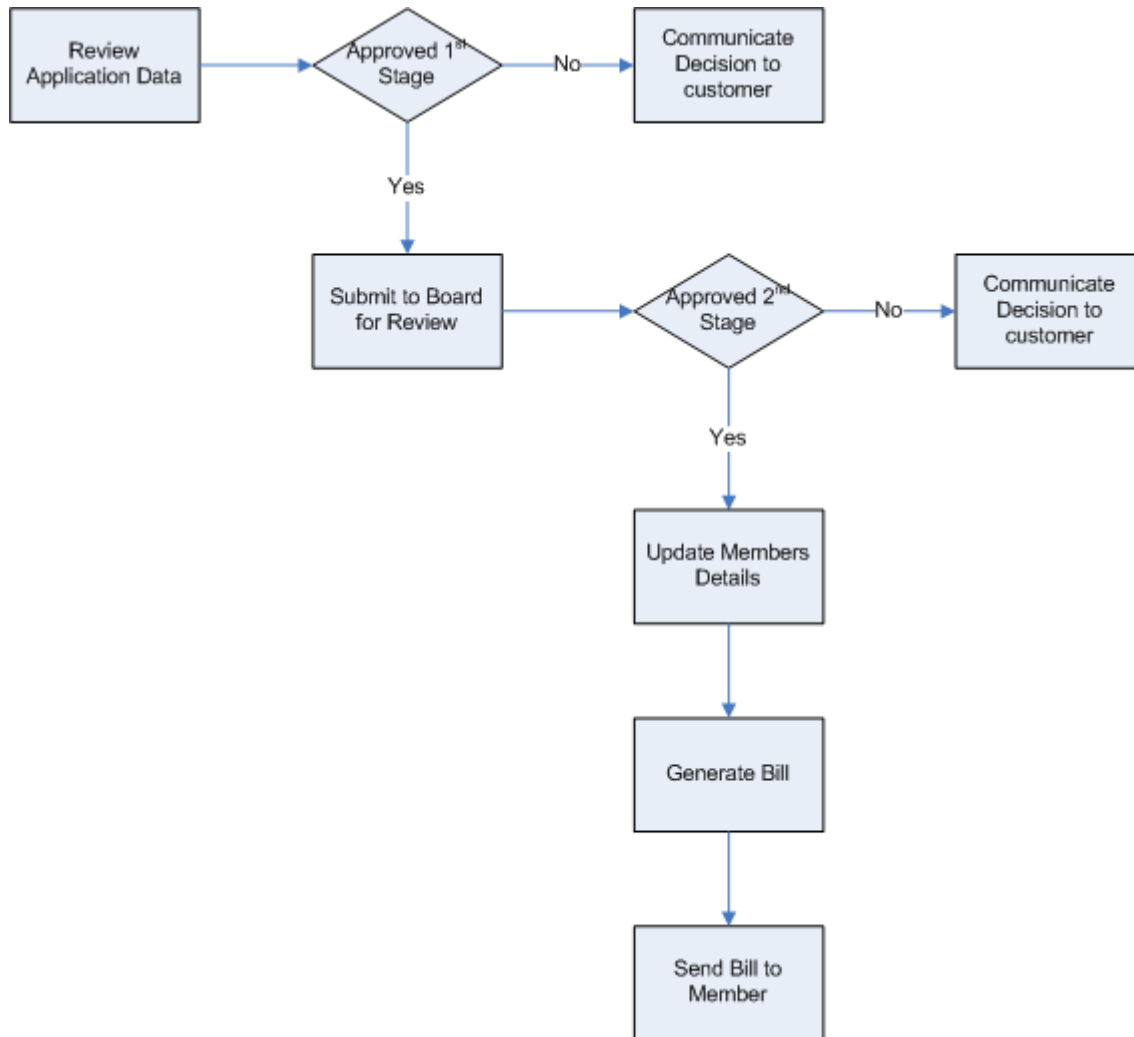
- Variable
 - Hold the ID of the donor
- Trigger
 - Activity
 - Type = 'GIFT'
 - Amount >= 1000
 - Store the ID in the variable
- Query
 - Query the NAME_DEMO table, the Field RELMANAGER has the login of the relationship manager
- Write Activity
 - iBO Code (Command Line)
 - ID and Relationship Manager as parameters

Automated Billing by Email

Generate dues and send by Email for prospects converting to new members

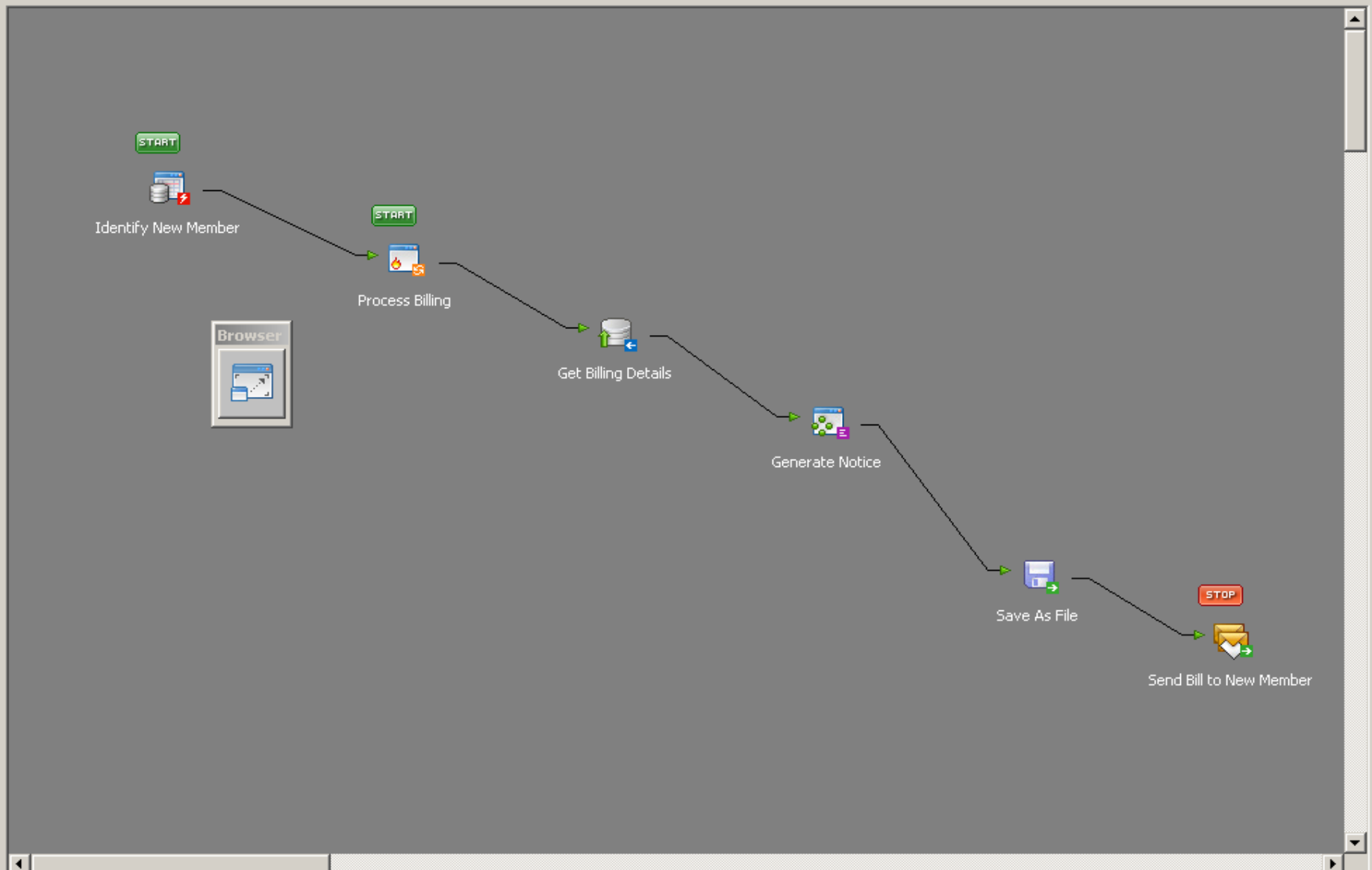


The Process



General Process

- When
 - New Member
- Reports
 - Renewal Notice
- Raw data
 - Name, Email, Amount Billed
- Variables
 - ID of Donor
- Decisions
 - None
- Outcomes
 - Activity



A Note About Triggers

- Two temporary tables are available in triggers
 - Old data is stored in DELETED
 - New data is stored in INSERTED
- Fields are referenced as
 - INSERTED.MEMBER_TYPE, not
 - NAME.MEMBER_TYPE

Task Elements

- Variable
 - Hold the ID of the new member
- Trigger
 - Name
 - DELETED.MEMBER_TYPE = 'P'
 - INSERT.MEMBER_TYPE = 'NEW'
 - Store the ID in the variable
- Query
 - GROUP BY to Get Subscription Information

```
SELECT
    Name.ID AS ID, sum(Subscriptions.[BILL_AMOUNT]) AS
[BILL_AMOUNT], Name.[FIRST_NAME] AS [FIRST_NAME], Name.[LAST_NAME] AS
[LAST_NAME], Name.EMAIL AS EMAIL
FROM
    Name INNER JOIN Subscriptions ON Name.ID = Subscriptions.ID
WHERE
    Name.ID = '{=Variables("iMISId")}'
GROUP BY
    Name.ID, name.first_name, name.last_name, name.email
```

Task Elements – Cont.

- Report
 - Notice.rpt
 - Parameter using ID Variable
- Save File (Optional)
- Send Email