BEGINNERS GUIDE TO IMIS
DOUG MORRIS, COMPUTER SYSTEM INNOVATIONS, INC.

AGENDA

In the beginning...
Learn about the foundation of IMIS

RISE up!
See how IMIS is moving towards RISE

The future
With no more desktop, what is next?
WHO IS THIS DOUG MORRIS GUY?

- Started CSI 25 years ago
- Started implementing iMIS 24 years ago
- Joined the NiUG International Board 11 years ago
- Kicked off the NiUG Board 6 years later
- Joined the NiUG AP Committee 2 years ago
- Got stuck with the NiUG AP Program last January
- Lives near Chicago IL USA, apparently has an accent, types dates the wrong way, and spells things funny

CLASS DEMOGRAPHICS

- How long has your organisation used iMIS?
- How long have YOU used iMIS?
- What do you really want to learn?
- What have you heard that confuses you?
**versions**

- 4.x
- 10.x
- 15.x
- 20.0
- 20.1
- 20.2.1
- 20.2Q42015
- 20.2.46 (latest interim)

**the core modules of the acc**

ADVANCED ACCOUNTING CONSOLE

- Membership
- Dues
- Meetings
- AR/Cash
THE POPULAR ADD-ON MODULES

- Fundraising
- Full Order Entry
- Service Central
- Certification
- Expo

MEMBERSHIP/CUSTOMERS

Demographics

History
CUSTOM DEMOGRAPHIC TABS

- iMIS allows easy setup of user defined tables and fields managed through the iMIS additional window setup.
- Other features include overview tab that displays selected fields from other tab tables, access keywords to restrict access, and user editing of tab preferences to arrange tab order.

DEMOGRAPHIC TABS (CONT)

- The Overview tab allows the display of fields from standard Name table and custom user define tables.
- iMIS 10.6 and higher allows you to put SQL Formulas on the Custom Tab. You must know SQL or get help from someone who knows it (hint, NiUG Listserv). However, you can place read-only fields on the custom tab with these formulas.
**HISTORY TABS**

- The history section is used to enter, edit, and view customer information. New records can be added to a data grid when the grid is white. The Activity/History section tabs can be toggled back and forth between displaying current and historical data.
- Editing the tab preferences allows the user to order the tabs.
- Note: Access to see or to edit some tabs may be limited by your administrator. Your administrator can set up optional Activity tabs to be displayed in the history section.

**ACTIVITIES**

- The Activities-All tab enables you to enter, edit, and view activity records for a customer record. The following fields display on the Activities-All tab: Type, Product Code, Date, Description, Note, Thru Date, Amount, Units, and Attachment(s).
- Show Individuals: Toggles between viewing activities at the individual and company employee level, or the company level.
- Note: Your administrator can limit access to Activities-All tab functionality. To enter and edit activities, the Customers authorization level needs to be set to three (3) or greater. To delete activities, the Customers authorization level needs to be set to four (4) or greater.
- To view all Activities:
  - Open a customer’s record in the Manage customers window.
  - Select the Activities-All tab.
  - Double-click the gray box to the left of the Type field to open the Activity Detail window for the activity.
- Attachments can be inserted to an Activity record by double clicking on the activity record and selecting the attachment option.
VIEW ACTIVITY TASKS

- An activity task is a reminder that action needs to be taken regarding a specific customer by a specific date (follow-up date). All activity tasks must be assigned to a user and have a follow-up date.
- Activity tasks can be assigned to you, other iMIS users, or all users. When the user to whom you assigned the task logs in on the follow-up date, the task for the customer automatically displays on the View activity tasks window (from Customers, select View activity tasks). However, this only occurs if the Check Tasks on Login option is enabled for you.

CHANGE LOG HISTORY

- Tracking change history of standard or user defined fields is critical and often missed in the setup process
- Requires the Table and the Field name to be entered for tracking
- Retention months can be set for record purge in the future
- This is for IMIS back office fields and demographics, but not Activities
COMMITTEES

- The Committee subsystem of iMIS Customer Management tracks committee appointees, their respective terms, and the positions they have held. The Manage committees window gives you full access to all committee data maintenance, inquiry, and reporting functions. This access enables you to do the following:
  - Activate and view committee rosters of past, current, and future appointees
  - Maintain a list of appointees and their positions and terms
  - Maintain a list of committee applicants and proposed appointees
  - Create and store minutes on any committee meeting or activity
  - Print a detailed roster of past, current, and future committee appointees and applicants
  - Print personalized, mass letters to any committee grouping
  - Print labels for any committee list
  - Maintain the tables of committee codes and positions

COMMITTEES (CON’T)

- Adding a new committee member creates an activity record
- Position & committee code managed under the “More” option
- All reports are run by selecting the “Print” button in the lower left
- View past & future committee members

- Never delete committee records because the activity history will be lost
- Instead change term dates to end a term or someone leaving before term end
- Add new record for change of position
USER CREDENTIALS

• This area allows you to create security credentials, login authentication and role based access for staff (Full & Casual) users and public access.

• Authorization levels let you precisely control the iMIS Desktop privileges of individual users. A standard type of privilege (such as Run reports) is associated with each level, but specific windows and fields also become available at certain levels. Note that Casual records are limited: you cannot assign them authorization level 8 or the SysAdmin role.

CUSTOMER TYPES

• One of the primary strategy behind establishing customer types should be to distinguish different pricing levels. This usually pertains to billing, but can also include event registrations and order pricing. Customer types must be mutually exclusive; in other words, each record may have only one customer type.

• Define the record type as a company or individual record

• Define the record type as a member or non-member

• Set default billing codes for dues items to be billed for the customer type

• Set customer type to handle list billing (ex. bill company for all employee dues)
ACTIVITY TYPES

- Custom activity types can be created to enhance data collection and retention of pertinent information about a record
- Ability to create private historical information with keyword access
- Ability to create new history tabs
- Ability to allow user edit
- User defined prompts allow storage data in standard activity fields

DUES (AKA BILLING)

- Very powerful module
- Supports both Cash and Accrual Billing
- Supports both Anniversary and Annual Billing (based on your fiscal start date only)
- Can reference data fields in iMIS for billing (e.g. NUM_OF_STAFF, NUM_OF_OFFICES, NUM_OF_DOCTORS, etc)
- Supports forward and backwards proration (bill everything now, collect smaller amount at renewal or just bill amount due now)
- Supports future credits and write-offs
- Supports grace periods
  - start billing after X days
  - Don't restart billing if paid within X of lapse
- Driven by the Customer Type Table OR simply a subscription
DUES OVERVIEW

DEFINE YOUR PRODUCTS
IF REQUIRED, MAP THEM TO A CUSTOMER TYPE

CREATE A BILLING CYCLE
START BILLING

EVENTS (AKA MEETINGS)

• Think of an Event as a container - it contains...
  – A title
  – Your functions (aka sessions)
  – Begin and End Date/Times
    • Including Early/Reg/Late Cut off
  – Entity Information
  – Totals
  – Description/Address/Coordinators/Notes
  – Web Settings/Options
Each event must have at least one function.
Functions contain:
- Dates/Times
- Pricing
- Tracks
- Categories
- Maximum attendance
- Entity Information (for fundraising functions)
- Web settings
- CEU Information
- Ticket Information
FUNCTIONS

• Overview
• Attendee
• Other
• Badges
• Function Notes
• Account info
AR/ CASH

• Cash Receipts
• Sales Transactions
• Credit Memos*
• Debit Memos*
• Batch management
• Credit Card Reporting**
• Month End Procedures
  – GL Integration
  – Credit Invoices
  – Write-Offs
  – Deferred Income**
• AutoPay**
• Simple Order Entry*

*Replaced with Full Order Entry

**Optional Modules

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BATCH MANAGEMENT

Manage batches

<table>
<thead>
<tr>
<th>New</th>
<th>Open</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Batch Details

- Description
- Cash entity
- Date
- Date Created
- Created by
- NV GL
- Status
- Last Updated
- Updated by
- Event

Show: Open | Ready | Both | Closed | All

Audit Trail

- Batch: 0000-1
- Date: 2016-05-30
- Debit: DAILY BATCH

Status: Open | Posted/Closed | Ready

Count
- Amount
- Control
- Actual
- Account
- Date

```
**BATCH MANAGEMENT**

- Regular batches do not need to be posted in order to populate all data within iMIS.
- Web batches must be posted in order to be “complete”

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**CASH RECEIPTS**

![Cash receipts image](image_url)
CREDIT CARD SEARCHING

AUTOPAY

Automatic payments

- Process renewal payments
- Review renewal payments
- Process recurring donations
- Review recurring donation payments
MONTH END PROCEDURES

AR/Cash
- Enter and edit transactions
- Cash receipts
- Sales transactions
- Credit memos
- Debt memos
- Import transactions
- Manage batches
- Credit card reporting
- Credit card reports
- Search credit card sets
- Generate reports
- Process month-end procedures
- Post transaction journal
- Auto payments
- Set up tables
- Set up module

FUNDRAISING

- Gift and Pledge Entry
- Rapid Gift Entry (two types)
- Pledge adjustments
- Premiums
- Track appeal expenses
- Manage requests
- Recurring Donations and Payments*
ENTER AND EDIT GIFTS AND PLEDGES

RAPID GIFT ENTRY

Add to the favorites bar by selecting it, or by getting them from another browser. Import your favorites.

Enter gifts

To create a customized rapid gift entry table, specify default values for gift properties and the number of gifts to enter, and then click Go.

Transaction Date: 6/1/2016

How many rows would you like: 5

Go
PLEDGE CREDIT MEMOS AND DEBIT MEMOS

APPEAL EXPENSES
MANAGE REQUESTS

RECURRING DONATIONS AND PAYMENTS
SERVICE CENTRAL

- A one stop module for the customer service staff
- Pay open AR
- Process billing (dues)
- Register for an event
- Enter Gifts/Pledges
- Process sales transactions
- Process orders
- Print receipts

PROCESS CUSTOMER REQUESTS (PAY STUFF)
PRINTING

ORDERS (AKA FULL ORDER ENTRY)

- Required for web based product orders
- Supports
  - Add on charges – (Freight and handling)
  - Inventory (including backorder processing)
  - Restocking
  - Various order types
  - Order Staging
  - Warehouses
  - Advanced Taxes
  - Product categories
CERTIFICATION (OLD)

- Not web based
- Supports more complex requirements than “New” Certification
- Including...
  - Categories
  - Sub Components

COMPONENTS
CATEGORIES!

For booth sales and prospecting
- Very very powerful can even..
- Assign booths based on a point system (previous years attended, etc.)
- Keep competitors from being put next to each other
- Handle waitlists
- Handle service contractors
- Form tracking..

Interfaces with EXPOCAD

EXPOSITION

Other than EXPOCAD does not have a web interface at this time
EXPO

OUT WITH THE OLD, IN WITH THE NEW
RISE UP!

- RiSE is...
  - A content management system that iMIS is built on
  - While it debuted in 15.2.x...being on the latest version of iMIS is beneficial
  - The framework for iParts aka Content Items aka Dynamic Content Items
  - RiSE stands for
    - Nothing! It is just a name
- iParts consist of everything from simple HTML containers to Address Selectors to Order Confirmations
- So a RiSE webpage is made up of iParts (or Dynamic Content Items)
RISE PAGE

Ways to Give

Find the iParts

WEBSITES THAT COME WITH IMIS

CORE SITES

- Core
  - Staff (responsive)
- Quick Start Sites (responsive)
  - Member*
  - Donor
  - Annual Conference
- Mobile
  - Annual Conference
  - Member

*there are two Member sites, one is responsive and is denoted as such
WEBSITES THAT COME WITH I M I S

SITE MAPS
**VIEW TASK LIST**

- Core sites cannot be modified but you can.
  - Make a copy of them or their individual pages and tweak
  - Change short cuts to point to your content
SHORTCUTS

REMEMBER?

COPYING CORE PAGES
**STAFF SITE**

- A RiSE Website
- Replacement for the iMIS Desktop
- Not quite there yet
EVERYTHING STARTS FROM THE ACCOUNT PAGE

Engagement metrics
This chart displays a count of engagement activities for this contact. Memberships and donations do not include items that are paid in full. Challenges and individual donations do not include pledges. Committee counts are the total active memberships in any committee. Use this information when you talk with your constituents to encourage them to take advantage of these benefits.

Membership
- ID: 20451
- Member type: Non member
- Chapter:iful
- Status: Paid
- Last name: Smith
- Last updated: 1/20/16

Addresses
- Address:
STAFF SITE
REGISTER

Community Day

Please join us for a day of community service. We will work to improve the quality of the area around the conference site to plant a community garden. When we dedicate more and more people to planting a portion of our registration fees will help to support our community's gardens.

Program

Only display program items in registartion view

Sunday, 01 January 2017
10:00 AM - 5:00 PM
Main Stage
Price: 75.00

STAFF SITE
COMMITTEES

<table>
<thead>
<tr>
<th>Committee</th>
<th>Number of Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology Committee</td>
<td>11</td>
</tr>
<tr>
<td>Membership Committee</td>
<td>11</td>
</tr>
<tr>
<td>Education Committee</td>
<td>9</td>
</tr>
<tr>
<td>Board of Directors</td>
<td>8</td>
</tr>
<tr>
<td>Volunteer Committee</td>
<td>7</td>
</tr>
<tr>
<td>Governance Committee</td>
<td>4</td>
</tr>
<tr>
<td>Governmental Affairs Committee</td>
<td>4</td>
</tr>
<tr>
<td>Awards Committee</td>
<td>3</td>
</tr>
<tr>
<td>Finance Committee</td>
<td>3</td>
</tr>
</tbody>
</table>
**STAFF SITE MEMBERSHIP DASHBOARD**

- **Total members**: 2,626 (Bob access denied)
- **New members**: 0 (Last year’s count: 5)
- **Renewals**: 0 (Last year’s count: 3)
- **Lapsed members**: 2 (Last year’s count: 3)

### Members by member type

- Associate Member
- Company Member
- Regular Member
- Student Member

### Members by region

- **North Chapter**: 348
- **South Chapter**: 69
- **West Chapter**: 57
- **East Chapter**: 29
- **North Chapter**: 29

### Recent history

- **South Chapter**: 348
- **North Chapter**: 69
- **West Chapter**: 57
- **East Chapter**: 29
- **North Chapter**: 29

Dashboards reflect all year data unless otherwise indicated.
STAFF SITE
COMMERCE DASHBOARD

Product revenue: 137
Last year: 107
Increase: 30%

Product orders: 5
Last year: 3
Increase: 66%

Products sold: 5
Last year: 3
Increase: 66%

Unique customers: 3
Last year: Unknown
Increase: N/A

Product sales by member type:
- Non Member: 3
- Regular Member: 2

Product sales by category:
- Category A: 3
- Category B: 2

STAFF SITE
FUNDRAISING DASHBOARD

Funds raised: 1,479
Growth: 31%

Number of gifts: 4
Last year: 2
Increase: 100%

Unique donors: 4
Last year: 2
Increase: 100%

Average gift: $370
Last year: $250
Increase: 48%

Funds raised by year:
- 2012: $250,000
- 2013: $300,000
- 2014: $400,000
- 2015: $350,000
- 2016: $300,000

Recent gifts:
- $100, $50
- $150, $200
- $250, $100
- $300, $150
- $400, $200

Event log reports:
- Detailed report: View all
- Campaign report: View all
- Revenue gifts: View all
### STAFF SITE

**FUNDRAISING DASHBOARD**

<table>
<thead>
<tr>
<th>Gift Item</th>
<th>Number of Gifts</th>
<th>Funds Raised</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help to restore marshlands and fresh water habitats</td>
<td>1</td>
<td>1000.00</td>
</tr>
<tr>
<td>Support the Emergency Relief Fund</td>
<td>1</td>
<td>300.00</td>
</tr>
<tr>
<td>Distribution to the Building Fund</td>
<td>1</td>
<td>150.00</td>
</tr>
<tr>
<td>General Distribution</td>
<td>1</td>
<td>78.97</td>
</tr>
</tbody>
</table>

### STAFF SITE

**FUNDRAISING – MOVES MANAGEMENT**

<table>
<thead>
<tr>
<th>My major donors</th>
<th>Title</th>
<th>Company</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*There are no records.*
### STAFF SITE CERTIFICATION - NEW

#### Enrolments by program

<table>
<thead>
<tr>
<th>Program</th>
<th>Total</th>
<th>Enrolled</th>
<th>Eligible, Not Enrolled</th>
<th>Grad. Period</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Certification Maintenance</td>
<td>15</td>
<td>0</td>
<td>15</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Industry Certification Program</td>
<td>65</td>
<td>7</td>
<td>58</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Practice Management certificate</td>
<td>61</td>
<td>10</td>
<td>51</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Practice Management Maintenance</td>
<td>24</td>
<td>0</td>
<td>24</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Program components

- **Name**: Component Name
- **Program**: Program Name
- **Code**: Code
- **Agreement Required**: Agreement Required
- **Grade Required**: Grade Required

<table>
<thead>
<tr>
<th>Program</th>
<th>Code</th>
<th>Agreement Required</th>
<th>Grade Required</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do独特1</td>
<td>12345</td>
<td>True</td>
<td>True</td>
<td>Enable</td>
</tr>
<tr>
<td>Do独特2</td>
<td>67890</td>
<td>False</td>
<td>False</td>
<td>Delete</td>
</tr>
<tr>
<td>Do独特3</td>
<td>32109</td>
<td>True</td>
<td>True</td>
<td>Delete</td>
</tr>
<tr>
<td>Do独特4</td>
<td>98765</td>
<td>False</td>
<td>False</td>
<td>Delete</td>
</tr>
</tbody>
</table>
### STAFF SITE
#### CONTINUUM (REPORTS!)

**Continuum**
- Guided Performance Scorecard
- All reports
- Contact reports
- Fundraising reports
- Event reports
- Commerce reports
- Campaign reports
- Segmentation reports
- RIM reports
- Process Manager reports
- Certification reports
- Content reports

### STAFF SITE
#### GUIDED PERFORMANCE SCORECARD

**Guided Performance Scorecard**

<table>
<thead>
<tr>
<th>Key Performance Indicators</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>Goal</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Performance Index</td>
<td>32.77</td>
<td>29.48</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Recruitment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment &amp; Acquisition Index</td>
<td>27.00</td>
<td>31.33</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>29.00</td>
<td>75.48</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Member Acquisition</td>
<td>50.00</td>
<td>83.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Initiatives to Identify</td>
<td>5.00</td>
<td>6.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Engagement</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engagement Index</td>
<td>2.00</td>
<td>1.90</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity per Member</td>
<td>3.00</td>
<td>9.08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Committee Participation per Member</td>
<td>1.00</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Mail per Member</td>
<td>6.00</td>
<td>7.80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emails per Member</td>
<td>12.00</td>
<td>13.08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Activities per Member</td>
<td>2.00</td>
<td>3.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Growth</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth Index</td>
<td>25.00</td>
<td>27.48</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Registrations per Member</td>
<td>1.00</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member Increase</td>
<td>2.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renewal Rate</td>
<td>69.00</td>
<td>55.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue per Member</td>
<td>15.00</td>
<td>20.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
THE RECAP

• Desktop vs. ______
  – Membership/Customers/Community
• RiSE stands for ____________
• RiSE is a ____________
• Activities/Demographics vs. Interactions and Panel Editor/Panel Sources
• Dues/Billing
• Events/Meetings
• Certification – Old and New
QUESTIONS?

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