

30 iMIS Tips and Tricks in 30 Minutes

Association Technology Solutions

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About ATS

- * Serving iMIS community since 1995
- * Full-service Authorized iMIS Solutions Provider (AiSP)
- * Application development to extend the functionality of iMIS
- * 2015 and 2016 Authorized iMIS Solution Provider (AiSP) of the Year



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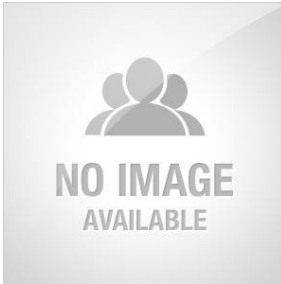
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Richard Banks

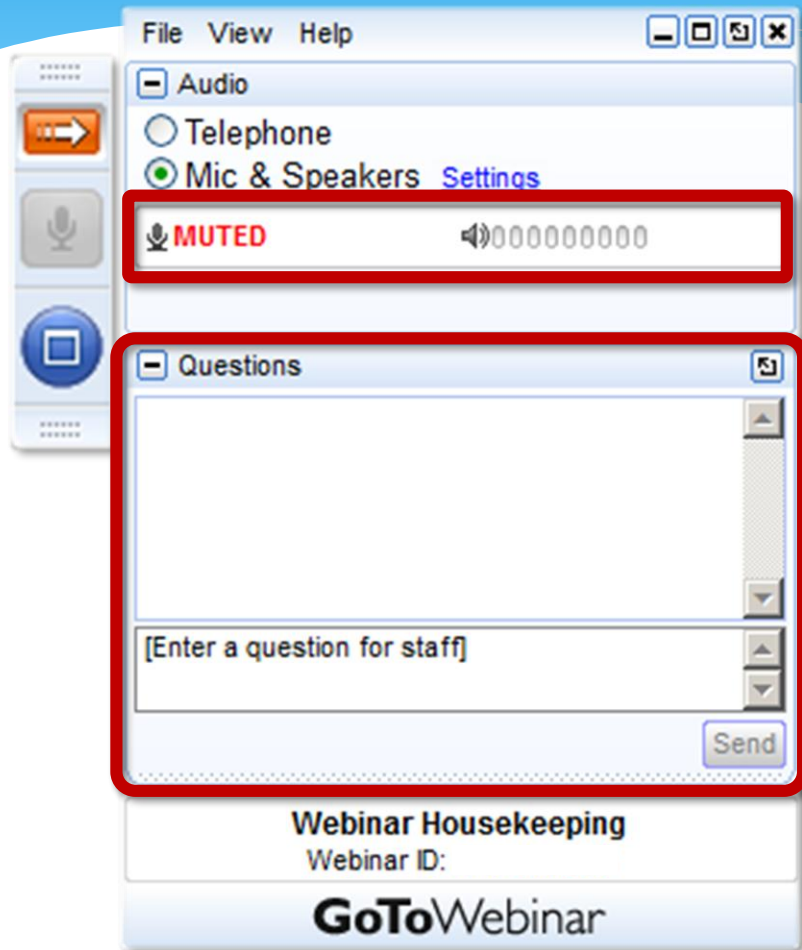
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Using GoToWebinar



- * Attendees are muted to reduce background noise
- * Remember to ask questions via the **Questions** panel
- * Questions will be answered during Q&A after presentation is complete

Keep current with iMIS

- * Consider upgrading 3-4 times a year instead of once every 3-4 years
- * Review and consider applying all patches



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Read Release Notes

- * Release notes may include server changes/updates such as downloading a new .NET framework
- * Many patches need to be installed on workstations also



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Test your Backups

- * Are your backups working?
- * Test them by restoring them



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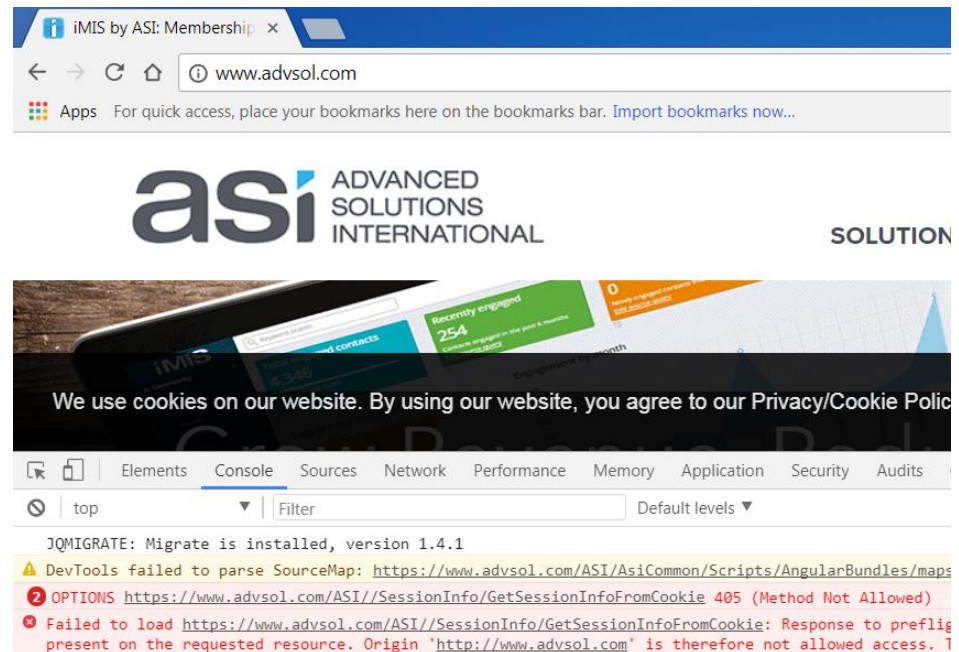
Be Careful Deleting RiSE Content

- * Be careful when “cleaning up” RiSE content/folders.
- * If you delete a folder it “flattens” all files and subfolders.
- * You cannot undo and have to rebuild the entire file/folder structure from items scattered throughout your recycle bin.



View the Console with F12

- * If something on the website looks like it isn't working, use F12 and view the Console tab to see if there is an error.



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Duplicate/Backup prior to editing

- * Before you edit any file, iqa, business object, back it up and duplicate it
- * It may get overwritten by an upgrade



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KEK file must be backed up

- * If you lose the KEK file you cannot recreate it and you will not be able to use your database.
- * Kek files change when upgrading
- * Uninstall/reinstall will erase and create a new kek file
- * You will not be able to login
- * It CANNOT be recreated if lost so the database will be rendered inoperable.
- * Typically located at
c:\AsiPlatform\Asi.Scheduler\App_Data



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Passwords

- * Passwords must be 7 characters (staff and public)
- * When you upgrade people won't be able to use their old passwords if they were less than 7 characters
- * They must reset their password on first login
- * Communication strategy

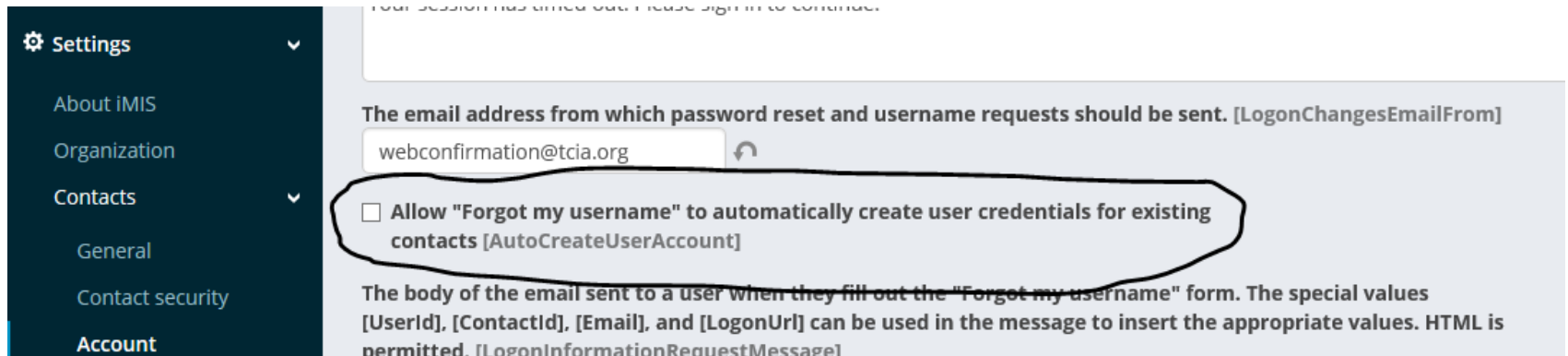
A password is like a toothbrush



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Credentials

- * Can be set by custom programs
- * Can be set using forgot password



The screenshot shows the ATSOI Settings page. On the left is a dark sidebar with a gear icon and the following menu items: Settings (with a dropdown arrow), About IMIS, Organization, Contacts (with a dropdown arrow), General, Contact security, and Account. The main content area is light gray and contains a message: "Your session has timed out. Please sign in to continue." Below this is a form field for "The email address from which password reset and username requests should be sent. [LogonChangesEmailFrom]" with the value "webconfirmation@tcia.org" and a refresh icon. A checkbox is checked, and the text "Allow 'Forgot my username' to automatically create user credentials for existing contacts [AutoCreateUserAccount]" is circled in black. Below this is another text field: "The body of the email sent to a user when they fill out the 'Forgot my username' form. The special values [UserId], [ContactId], [Email], and [LogonUrl] can be used in the message to insert the appropriate values. HTML is permitted. [LogonInformationRequestMessage1]".



Manager Passwords

- * System Admin group users - password changes every 90 days
- * Develop a plan to manage that (e.g., a process automation task to remind someone when it is about to expire)
- * Cannot reuse the last 4 passwords
- * Make sure you have a staff email address on your MANAGER account.



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Don't use Triggers

- * Upgrade can delete custom triggers added to tables that get changed and are not replaced.
- * Use process automation or Task Center
- * Causing cp shutdown, etc. when triggers don't run



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Create/Clone events in the staff site

- * Don't use the desktop to clone events
- * New tables/data is not all copied when cloning from the desktop.



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Migrate away from Crystal Reports

- * Use dashboards/IQA.
- * Use SSRS.
- * Only create reports if you need to print it and hand it to someone.



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Data Integrity

- * Create a dashboard for data integrity that can be viewed at any time
 - * Members without email
 - * Records linked to companies that don't exist



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