



# WEBINAR SERIES

# Please Stand By

The presentation will begin shortly





# WEBINAR SERIES

# Reviewing Your Processes

Strategies You Can Employ  
to Ensure an Easier Upgrade

Presented by:  
Association Technology Solutions



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



*Moderator:*

Michelle Clemovich

**Senior iMIS Consultant**

Association Technology Solutions, LLC

Direct: (703) 300-1436

Email: [mclemovich@atsol.org](mailto:mclemovich@atsol.org)



*Presenter:*

Tip Ramsay

**Creative Director**

Association Technology Solutions, LLC

Direct: (720) 945-7263

Email: [tramsay@atsol.org](mailto:tramsay@atsol.org)



*Presenter:*

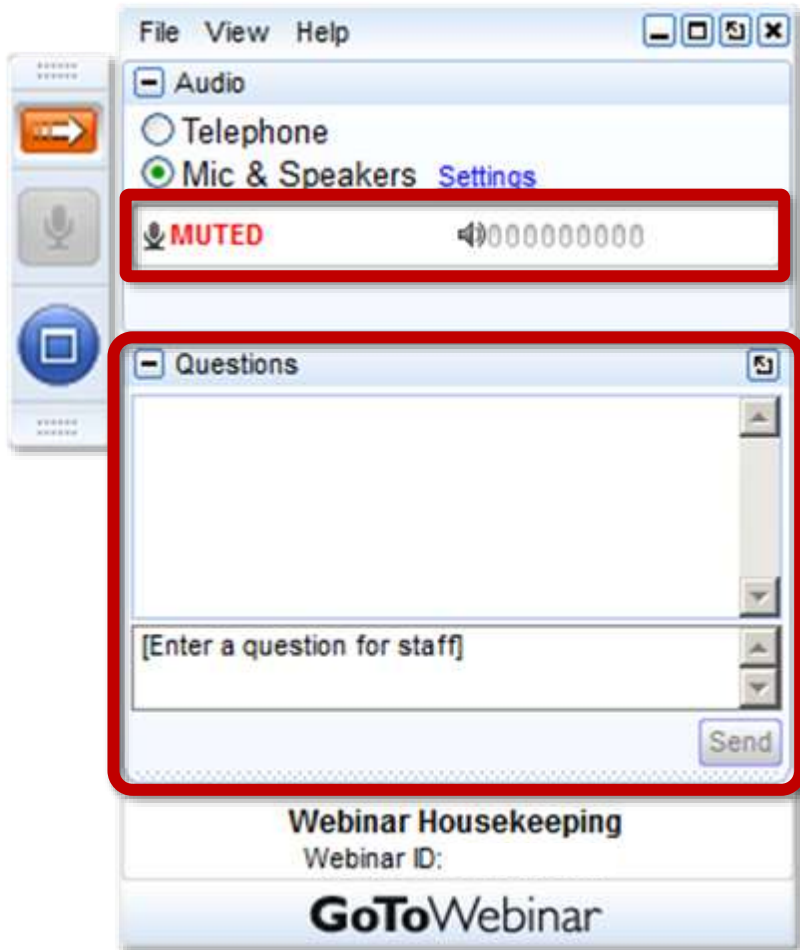
Jake Robida

**Service Team Manager**

Association Technology Solutions, LLC

Direct: (720) 235-4410

Email: [jrobida@atsol.org](mailto:jrobida@atsol.org)



- 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

# What Version Are You Using?

- Most existing clients are on iMIS 20
- iMIS Cloud will not be available to on-premise clients
- iMIS 2020 (formerly called 20.4) is expected to be announced in the future for on-premise clients and will be a snapshot of the current version of iMIS Cloud





# iMIS Cloud/iMIS 2020 Changes

- Both iMIS Cloud and iMIS 2020
  - No more desktop
  - Don't expect user defined/customizer tables. Panels instead
- iMIS Cloud Only
  - No access to SQL (views, Stored procedures, triggers)
  - No ability to install code, dlls on server

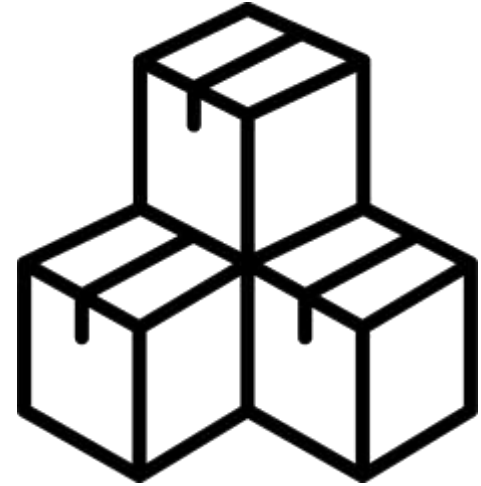




- Creating Triggers
- Creating Stored Procedures
- Creating SQL Views
- Creating custom code that is not cloud friendly
- Creating or editing Crystal Reports



- Inventory
  - Helpful Considerations from ASI: [How to Upgrade to iMIS Cloud](#)
- Review
- Assess
  - Is this currently used?
  - What is the benefit?
  - Can this be replaced with a Cloud friendly solution

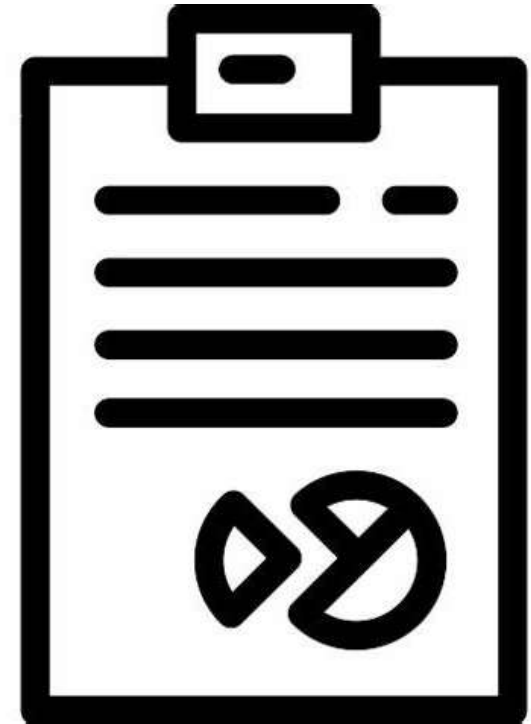


- Triggers
  - Process Automation Plus (PA+)
- Stored Procedures
  - Process Automation Plus (PA+)
  - [ATS Cloud Data Manager](#)
- Views
  - Custom Business Objects
  - Cloud Expression Builder
  - Nested IQA Queries



**Note:** Still Missing a solution for unions in SQL Views

- Intelligent Query Architect (IQA)
  - Great for data exports
  - Modify CSS to display on Web Sites
  - Primarily used for lists
- SQL Server Reporting Services (SSRS)
  - Display and print beautifully
  - Difficult to modify, labor intensive to build
  - [Future] Report writer (Exago)
- RiSE Pages
  - Easily add/remove fields needed
  - Apply CSS to make print friendly pages

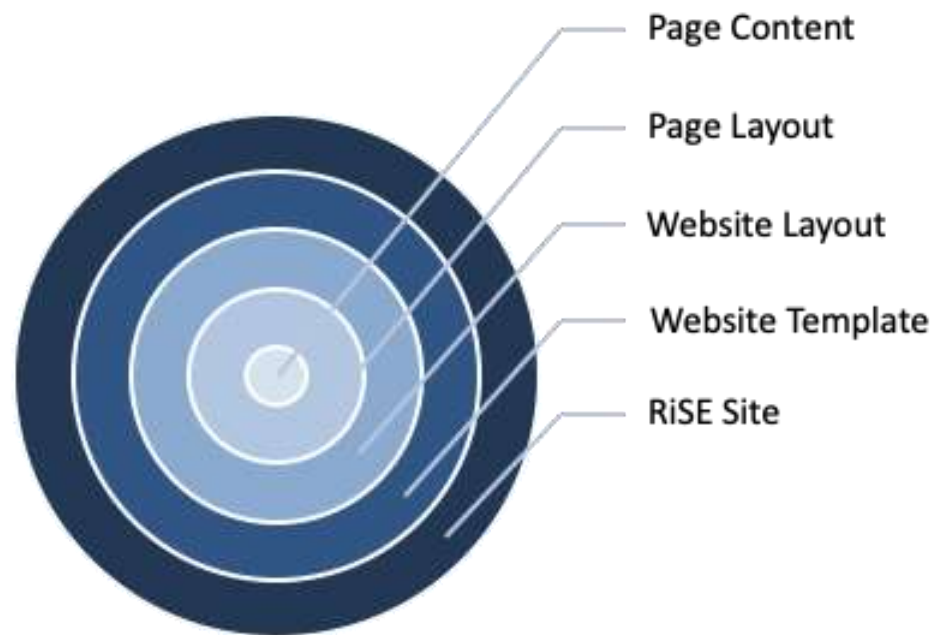


- Create staff-friendly pages for data entry
  - Use panel designer for forms including add/edit/delete operations for activities
  - Remove out-of-the-box i-parts not being used
- Update site navigation menus to meet your organization's needs
- Modify out-of-the-box dashboards



Theme Builder is a massive leap forward for cloud customers. Allowing custom RiSE-built templates and ability to make adjustments to the sites “wireframe” **without needing remote access to the web server.**

- Design implications for going from VDS to Cloud.
- Flat masterpage based will require a rebuild in TB
- Already on TB? There may be the need to remediate for minor differences in version. Much more portable to cloud.





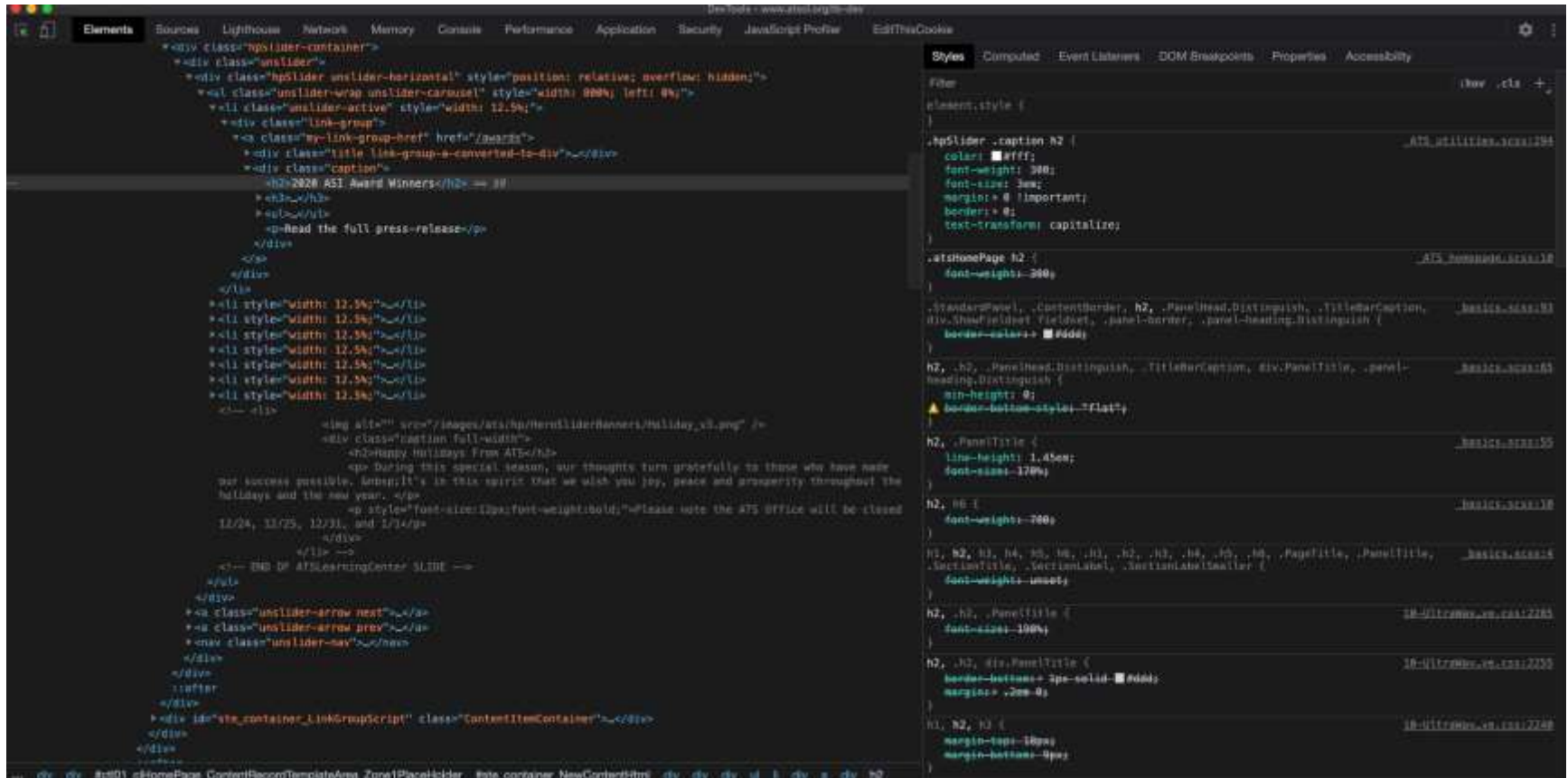
# Best Practices for Web Masters

- Understand linking in RiSE to get predictable results that won't confuse your users (or you!)
  - [Linking in RiSE webinar](#) : Content Link, URL, published file location, sitemap, shortcuts, nav-codes
  - Absolute vs. Relative
  - Watch out for [@]
- Images
  - Always resize/crop before uploading
  - Try not to "bake in" text
  - See image sizes on Devtools > network panel





# Browser Developer Tools



- **Search Engine Optimization (SEO)**
  - Proper use of semantic HTML
  - Keyword usage
  - No “baked in” text
  - Get rid of all “click here” links and start hyperlinking the actual words
- The concept of “[separation of content and formatting](#)” and “[semantic html mark-up](#)” is key to successful modern web design and development. Regardless of what system or CMS you use.
- Being **familiar with HTML, CSS, and Bootstrap** concepts is also necessary and will greatly increase your chances of being comfortable and successful in Theme Builder.

**PROTIP:** *Create a sandbox micro-site to develop in a safe place.*



- Bootstrap is based on a 12-column grid
- Made up of containers, rows, columns and breakpoints
- Yours to break... #1 cause of responsive issues is a fixed width set *somewhere*

```
<div class="container">
  <div class="row">
    <div class="col-sm-6 col-md-4">
      Takes up 4 of the 12 columns down to the "medium" breakpoint,
      below it will take of up 6 of the 12 columns.
    </div>
    <div class="col-sm-6 col-md-4">
      Takes up 4 of the 12 columns down to the "medium" breakpoint,
      below it will take of up 6 of the 12 columns.
    </div>
    <div class="col-sm-12 col-md-4">
      Takes up 4 of the 12 columns down to the "medium" breakpoint,
      below it will take of up 12 of the 12 columns making this
      box wrap to the next line and take up the full 12 columns.
    </div>
  </div>
</div>
```

- Reducing customizations **now** will make for an easier transition to the cloud **later**
- Evaluate your business processes (Join, Renewal, Event Registration, etc.)
  - Do they align with how iMIS works? If not, what is the cost benefit to your current custom solution?
- Make the most out of iMIS/RiSE, “use the tools”
- Bottom Line:  
**KEEPING iMIS UPDATED IS HIGHLY RECOMMENDED**



*Moderator:*

Michelle Clemovich

**Senior iMIS Consultant**

Association Technology Solutions, LLC

Direct: (703) 300-1436

Email: [mclemovich@atsol.org](mailto:mclemovich@atsol.org)



*Presenter:*

Tip Ramsay

**Creative Director**

Association Technology Solutions, LLC

Direct: (720) 945-7263

Email: [tramsay@atsol.org](mailto:tramsay@atsol.org)



*Presenter:*

Jake Robida

**Service Team Manager**

Association Technology Solutions, LLC

Direct: (720) 235-4410

Email: [jrobida@atsol.org](mailto:jrobida@atsol.org)





# More from ATS

Looking for more from the experts at ATS?

## Upcoming Webinars

<http://atsol.org/Webinars>

*schedule of upcoming webinars*

## Past Webinars

<http://atsol.org/PastWebinars>

*video recordings and  
downloadable presentation slides*

## Other Questions?

Email: [info@atsol.org](mailto:info@atsol.org)

Online: <http://www.atsol.org>

Phone: (720) 945-7252

