

Executive Series: An Overview of iMIS Cloud Capabilities

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
- Integration Bridges to over 125 third party vendors



Presenter:

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Presenter:

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Association Technology Solutions, LLC

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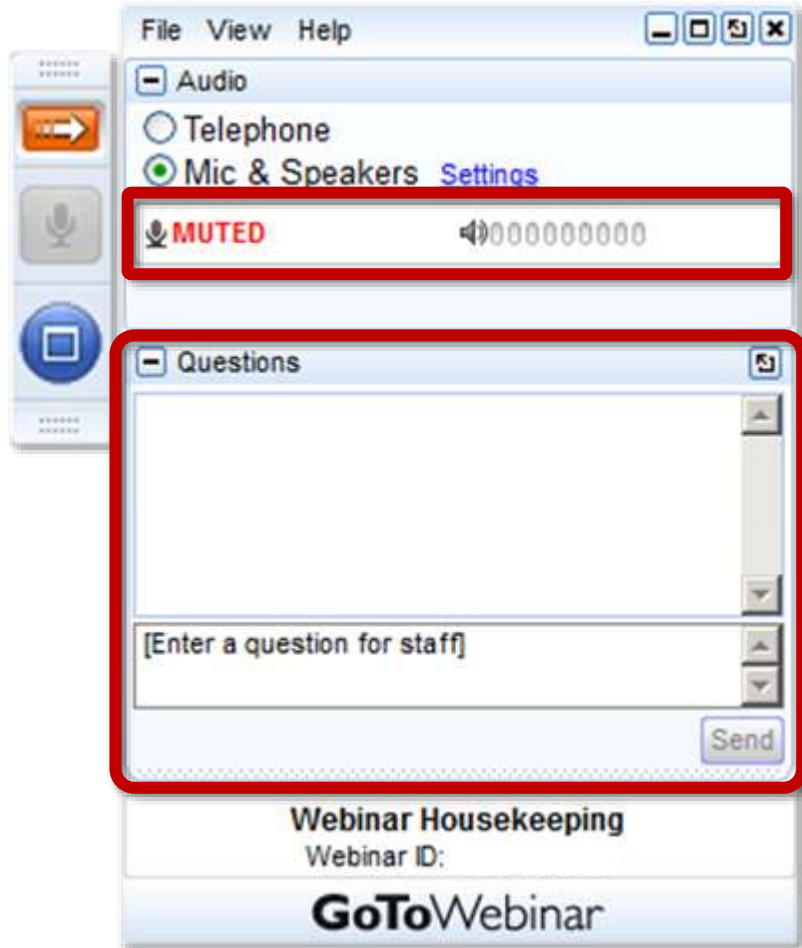
Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

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- 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

Executive Series: An Overview of iMIS Cloud Capabilities

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What are your plans?

- We are already in iMIS cloud?
- We plan to be using iMIS Cloud in the next year?
- We plan to be using iMIS Cloud in the next two years?
- We plan to be using iMIS Cloud in the next three years?
- We aren't sure we will ever transition to iMIS Cloud?

- Clients must be on the latest service pack before upgrading to iMIS Cloud (e.g., 2017 service pack "Y")
- Clients have the option of
 - Migrate directly to iMIS Cloud
 - Migrate to iMIS 20 Advance while getting ready to upgrade to iMIS Cloud



WEBSITE

The screenshot shows the homepage of the NATSAP website. At the top, there is a navigation bar with social media icons (Facebook, Twitter, Instagram) on the left and links for 'Create Account', 'NATSAP At A Glance', and 'Sign In' on the right. Below this is a teal header with the 'NATSAP' logo and the tagline 'Guiding the way'. A horizontal menu contains links for 'Who We Are', 'For Parents', 'Membership', 'Events & News', 'Research', and 'Career Center'. The main content area features a large photograph of four hikers with backpacks standing on a rocky mountain peak, looking out over a valley. Overlaid on the photo is the text 'Guiding the way' in a large, white, cursive font. Below this text is a yellow button that says 'Explore the Membership Directory'. At the bottom of the page, there are three colored sections: a teal section on the left with the text 'NATSAP 2020 THE STATE OF', a yellow section in the middle with 'WELCOME NATSAP'S NEWEST MEMBERS', and a red section on the right with 'WHERE MEMBERS CONNECT'. A small URL 'Transferro data from cdn.svndication.twimg.com...' is visible at the bottom left of the screenshot.



- Organize your profile management page for members
- Organize your profile management page for staff

241 Randall L. Richter (*** PatchDev - Patch *)

File Edit Cmds Utilities AutoDraft 17 Help

Home Customers Billing Events Fundraising AR/Cash Orders Certification Service Central Exhibition Exposition Subscriptions Referrals Issues Xtender

Customers

Manage customers
Manage committees
Manage chapter rosters
View activity tasks
Manage duplicates
Generate reports
Import activities

IQA
Set up tables
Set up module
Set up fundraising

Customers help

Manage customers Individual Member - Randall L. Richter

ID: 241 Individual Member Inactive Category

Profile Donor Data Status ATS_DUES ATS_Shopping_Cart Coupons ATS_PAYMENT_OPTIONS Notes Picture Financial Solicitor

First Name: Randall L. Richter Suffix: Randy
Company: ATS (OW) 4704 Harlan Street, Denver, CO 80212
Address: 4704 Harlan Street Denver CO 80212
Phone: (222) 222-2225
E-mail: mrichter@atsol.org

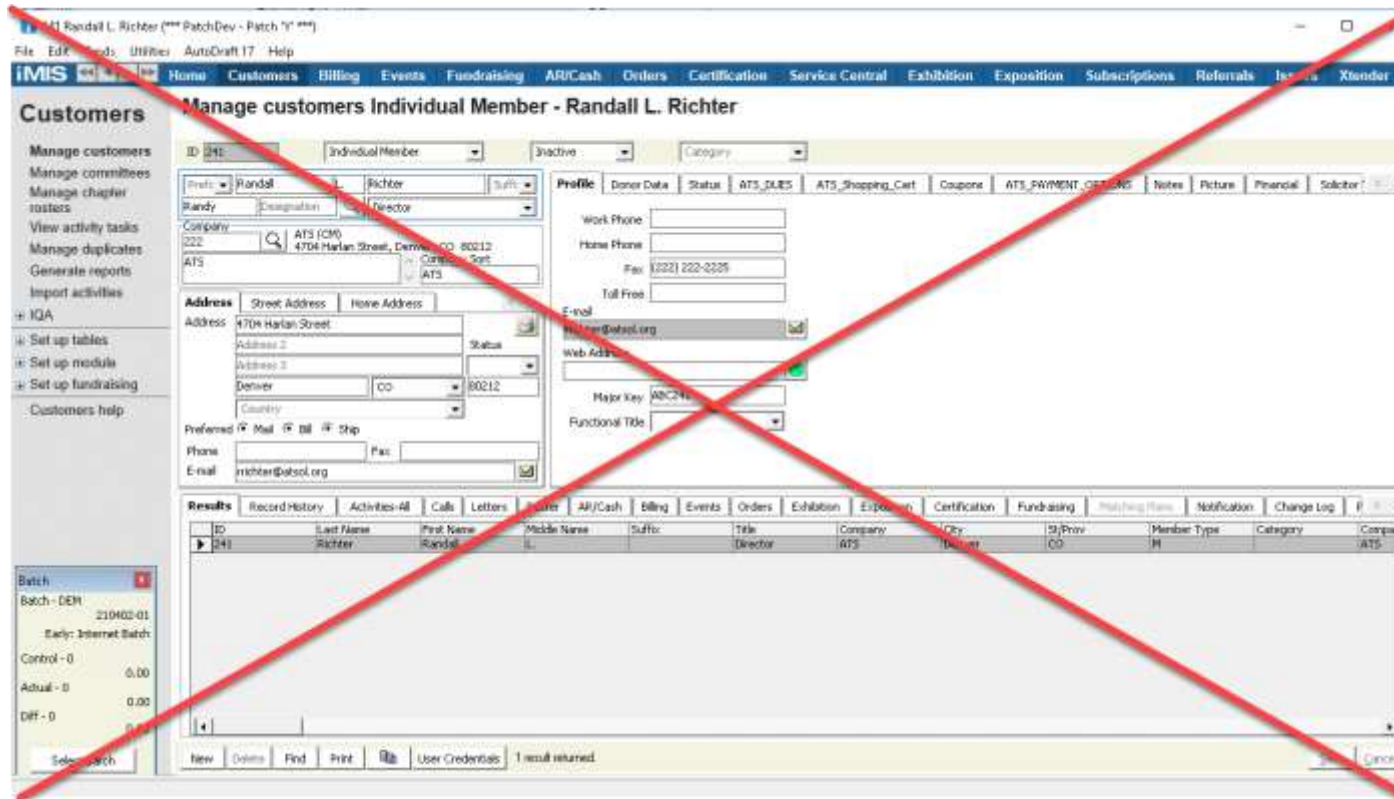
| ID | Last Name | First Name | Mobile Name | Suffix | Title | Company | City | St/Prov | Member Type | Category | Compu |
|-----|-----------|------------|-------------|--------|----------|---------|--------|---------|-------------|----------|-------|
| 241 | Richter | Randall | L | | Director | ATS | Denver | CO | M | | ATS |

Batch: 210402-01
Early: Internet Batch
Control - 0 0.00
Actual - 0 0.00
Diff - 0 0.00

New Delete Find Print User Credentials 1 result returned Save Cancel

PROFILE MANAGEMENT

- Organize your profile management page for members
- Organize your profile management page for staff



- Organize your profile management page for members
- Organize your profile management page for staff

The screenshot displays the iMIS profile management interface for a member named Randall L. Richter. The interface is divided into several sections:

- Navigation Menu (Left):** Includes options like Cloud Data Manager, Online Marketplace, Community, Dashboard, Engagement, Find contacts, Add contact, Manage duplicates, Committees, Communities, Volunteers, Security, Create Referral Coupons, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, and RISE.
- Search and User Info (Top):** A keyword search bar and user information for 'MANAGER MANAGER'.
- Profile Summary (Left):** Shows the name 'Randall L. Richter', title 'Director', mobile number '(720) 272-3994', a profile picture, and key details: ID 241, Member since 11/15/2012, Member type 'Individual Member', Status 'Inactive', and Paid through 12/31/2021.
- Engagement (Center):** Features an 'Engagement score' of 0 and an 'Engagement history' section with a 'No data found' message.
- Membership (Bottom Right):** A table listing membership details:

| | | | |
|------------------|-------------------|--------------|------------------|
| IMIS ID | 241 | Major key | ABC241 |
| Member type | Individual Member | Status | inactive |
| Billing category | | Paid through | 12/31/2021 |
| Chapter | | Member since | 11/15/2012 |
| Renewed | 4/7/2021 | Last update | 4/7/2021 8:31 AM |
| Last updated by | MANAGER | Date added | 11/30/2010 |
- RISE Actions (Bottom Left):** Includes buttons for 'Print Info', 'Public Profile', and 'Resolve Duplicates'.
- Alerts (Middle Left):** A notification to 'Follow up on 1/1/1900 (Unassigned) CALL -'.

- Organize your profile management page for members
- Organize your profile management page for staff

The screenshot displays the iMIS profile management interface for a member named Randall L. Richter. The page is divided into a left sidebar with navigation options and a main content area with tabs for 'About', 'Participation', 'History', 'Giving', 'Preferences', 'A2Z_BOOTH5', and 'A2Z_ORDER_ACTIVITY'. The 'History' tab is active, showing a table of recent transactions.

Member Profile:

- Name:** Randall L. Richter
- Role:** Director
- Mobile:** (720) 272-3994
- ID:** 241
- Member since:** 11/15/2012
- Member type:** Individual Member
- Status:** inactive
- Paid through:** 12/31/2021
- Follow up on 1/1/1900 (Unassigned):** CALL -

Recent transactions table:

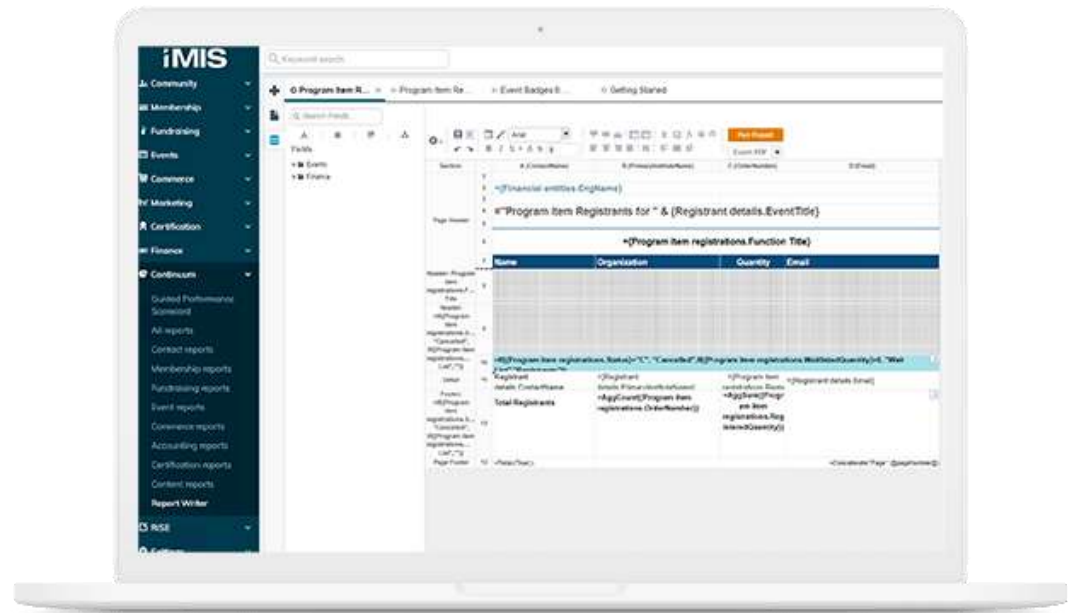
| Order Number | Order Date | Type | Amount | Balance |
|--------------------------------|------------|---|--------|---------|
| ▶ 1986.00 | 3/12/2021 | Event - SWACARD | 10.00 | 10.00 |
| ▶ 1893.00 | 2/21/2021 | Order | 65.00 | 0.00 |
| Line items: Bright Ideas (PDF) | | | | |
| ▶ 1894.00 | 2/21/2021 | Order | 65.00 | 0.00 |
| ▶ 1895.00 | 2/21/2021 | Order | 65.00 | 0.00 |
| ▶ 1896.00 | 2/21/2021 | Order | 65.00 | 0.00 |
| ▶ 1897.00 | 2/21/2021 | Order | 65.00 | 0.00 |
| ▶ 1898.00 | 2/21/2021 | Order | 65.00 | 0.00 |
| ▶ 1873.00 | 1/14/2021 | Event - Pathable Test for 3408 | 10.00 | 10.00 |
| ▶ 1862.00 | 1/7/2021 | Event - Members Only - For Kevin Smith - Billed to Randall L. Richter | 125.00 | 0.00 |
| ▶ 1863.00 | 1/7/2021 | Event - Members Only | 125.00 | 0.00 |

RISE Actions: Print info, Public Profile, Resolve Duplicates, Donate, Order, Register

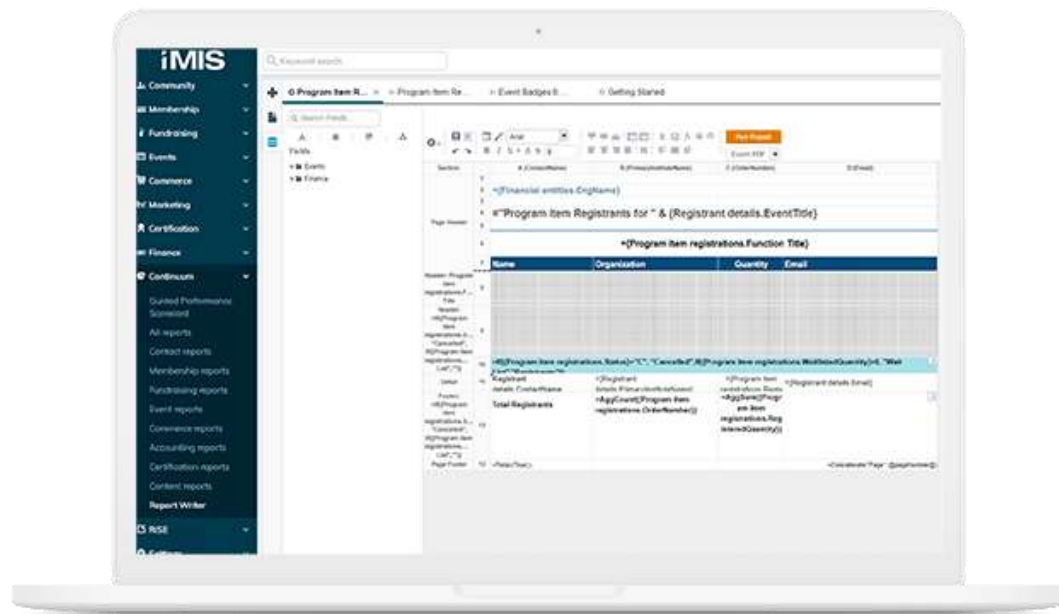
- No more Crystal Reports
- SSRS should be used sparingly
- Leverage dashboards
- New Exago Report Writer



- iMIS Report Writer, powered by Exago business intelligence (BI) software, allows you to easily turn data into actionable insights. With it, you can create advanced reports, visualizations, and interactive dashboards in iMIS with award-winning ease of use. The iMIS Report Writer features an embedded drag-and-drop report designer with secure access to iMIS data sources including Business Objects and IQAs.



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ACCOUNTING

- Dues billing changes

Generate renewals

[Run billing](#) [Billing batches](#) [Logs](#)

•Billing run name

•Billing cycle

•Billing type Renewals Rebill

•Bill date

Effective date *Anyone whose paid through date is before this date will be billed*

Other options

Only bill a single contact

Only bill contacts who are included in a particular query

Only bill contacts in a particular chapter

Do not prorate

Do not apply credits





ACCOUNTING

- Batch posting changes

Batch 210406-1 [Post Batch](#) [Run Report](#) ▾

Batch date: 4/6/2021 Status: Open [Set Ready](#)

Description: Transaction count: 2

Date created: 4/6/2021 1:47 PM Payment total: 0.00

Created by: AUTOBATCH

Select a query: [Export](#) ▾

| TRANSACTION NUMBER | BILL TO ID | CUSTOMER | CATEGORY | TRANSACTION DATE | PAYMENT ID | PAYMENT METHOD | DESCRIPTION | SUMMARY AMOUNT |
|--------------------|------------|--------------------------------------|----------|------------------|------------|----------------|-------------|----------------|
| ▶ 8209 | 18075 | Mr. John Tan, Versaton US | Invoice | 4/6/2021 | | | Exam Fee | 400.00 |
| ▶ 8208 | 18052 | Mr. Brian Murphy, IMIS International | Invoice | 4/6/2021 | | | Exam Fee | 400.00 |





ACCOUNTING

- Refund and/or invoice changes

Invoice Summary History Print

Invoice

| | | | |
|----------------|----------|-----------------------|----------|
| Invoice number | 2316 | Financial entity | DEMO |
| Invoice date | 4/6/2021 | Accounting method | Accrual |
| Invoice type | Regular | Original order number | 10559.00 |
| Source system | ORDER | | |
| Description | Exam Fee | | |

[Adjust Invoice](#)

Adjustment type

Transaction date

Reason

Reverse the invoice

Reverse the invoice

Write off invoice

Add or remove items

Adjust prices

A credit memo order reversing all of the line items in the invoice will be generated.

[Submit](#) [Cancel](#)



- SQL Views – Business Objects/IQA's
- Stored Procedures – Process Automation Plus
- Custom Forms – New Form Builder
- IBO for .NET - REST

Online Dues Clearance

Sorority Year:

Show: entries
 Search:

| ID | First | Last | * Type | Sorority Year | Local | Reg | Nat'l |
|-------|-----------|---------|----------------------|---------------|--------------------------|--------------------------|--------------------------|
| 45736 | Oron | Munroe | MBR - Graduate | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 40216 | Bella | Poodle | MBR - Associate | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 49945 | Cindy | Poodle | MBR - Graduate | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 40216 | Clara Mae | Poodle | MBR - Military UG | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 40215 | Daisy | Poodle | MBR - Cultured Pearl | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 40214 | Minnie | Poodle | MBR - Graduate | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 44075 | Priyanka | Rastogi | MBR - React Graduate | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 46009 | Test | Test | MBR - Life Member | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 45224 | Ima | Test | MBR - Military Grad | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 31731 | Member | test | MBR - Graduate | 2021 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Showing 1 to 10 of 14 entries

[Previous](#)

[Next](#)

- ASI has several training options for learning about the functionality.
- The ASI Learning Hub
- ATS/AiSP



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ATS HOW-TO-GUIDE FOR STAFF SITE

- <https://www.atsol.org/StaffSiteHowToGuide>

The screenshot shows the ATS website header with the logo and tagline "we can solve it." The navigation menu includes "ABOUT US", "SOLUTIONS" (highlighted), "WEBINARS", "PRODUCTS", and "SERVICE". The breadcrumb trail reads "Home > Solutions > iMIS/RiSE Staff Site How To Guide".

iMIS/RiSE Staff Site How To Guide

Three iMIS product logos are displayed: iMIS Cloud Enterprise (2007), iMIS Cloud Professional (2010/11), and iMIS 20 (2012/13 & 14).

- iMIS Cloud clients have no choice but to use the iMIS Staff Site.
- On premise clients are at different points in their iMIS Staff Site adoption strategy.

It is our goal to provide the tools and solutions to help clients begin to implement and flourish when transitioning to the iMIS Staff Site.

We find that some of the most simple tasks can be frustrating without the know how or training to get them done. ATS has developed a number of short videos that address some of the most common questions that we get asked about the iMIS Staff Site. Many of these are at the beginner level. We expect to add more advanced concepts and will certainly entertain any suggestions from the iMIS community.

Please visit the [ATS Learning Center](#) to find short, **free videos on key components of the iMIS Staff Site.**

[ATS LEARNING CENTER >>](#)



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?

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Phone: (720) 945-7252