

Getting the Most Out of your RiSE Website by Leveraging iParts (aka Dynamic Content Items – DCI)

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
- iMIS Bridge powered by ATS with over 140 integrations
- Over 100 RiSE website implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients



Presented by



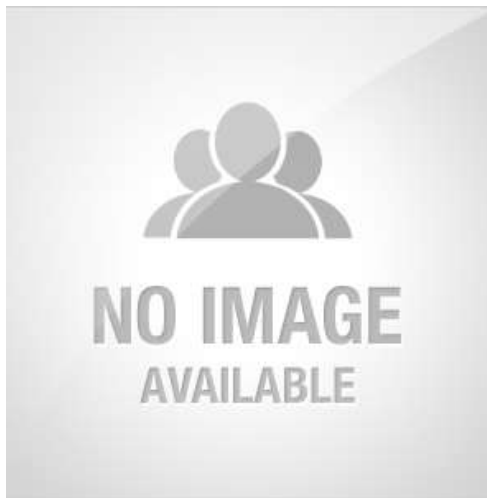
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Moderator:

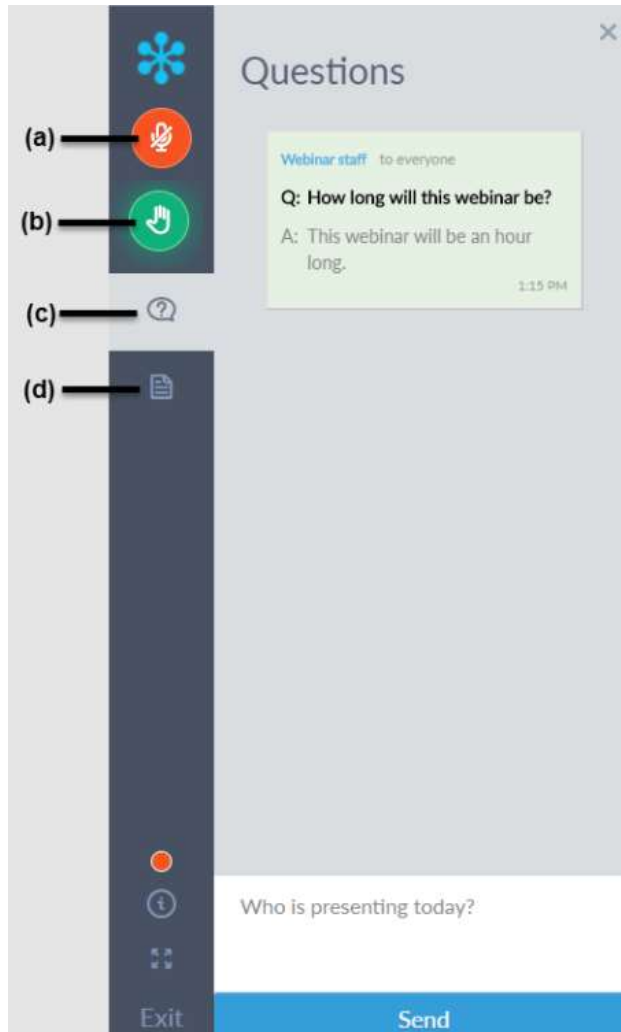
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Sales Manager

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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete



About Me



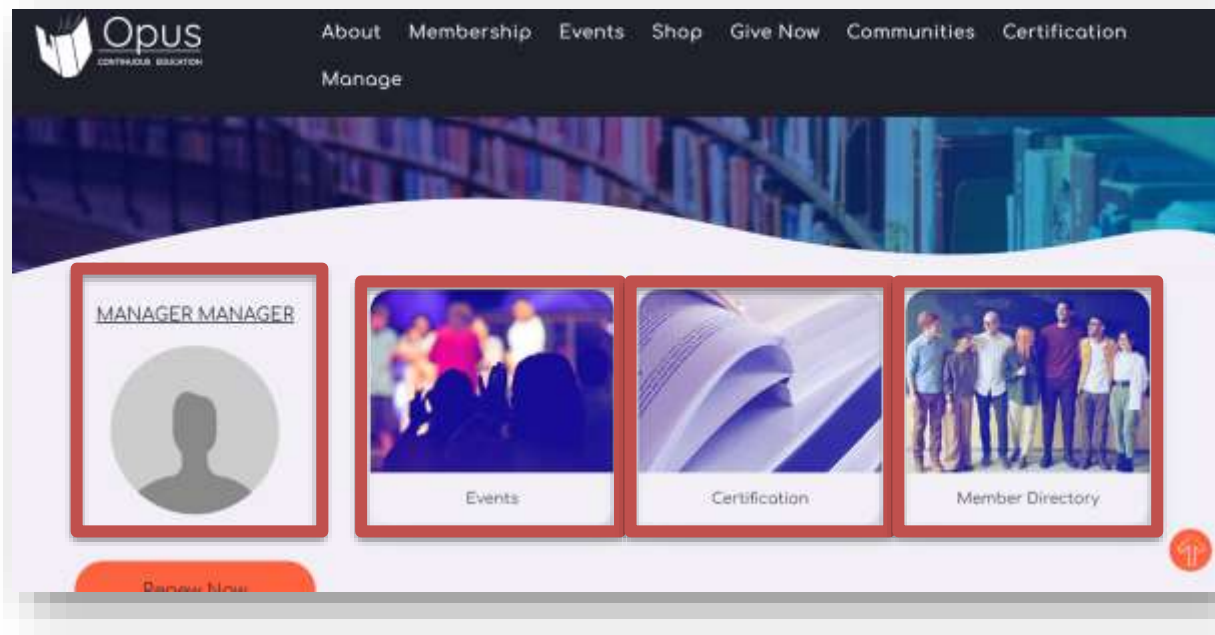
- With ATS since 2014
- Background in website management and support
- RiSE implementation, training, support
- ATS product implementation and support



iParts are the building blocks of every RiSE websites, but do you know what they are all used for? Join us as we discuss the most popular and some of the lesser known iParts available in iMIS.

What is an iPart/DCI?

- Officially known as “Dynamic Content Items”
https://help.imis.com/enterprise/features/rise/dynamic_content_items/dynamic_content_items.htm
- “unique components that can be placed together on content pages of your iMIS sites that you build with RiSE.”
- https://help.imis.com/enterprise/features/rise/dynamic_content_items/dynamic_content_items.htm
- Almost every piece of content in any iMIS website is an iPart/DCI...





What is an iPart/DCI?

- ...including the staff site

The screenshot displays the iMIS dashboard interface. On the left is a dark sidebar with navigation menus for Community, Membership, Fundraising, Events, and Commerce. The main content area features a search bar, a user profile for 'MANAGER MANAGER', and four summary cards: 5,576 total individuals, 286 total organizations, 5 unique logins past 3 months, and 0 recent posts past 3 months. Below these are two charts: 'Contacts by type' (a donut chart) and 'Contacts by region' (a bar chart). A 'Contact reports' button and a 'Recent history' list are also visible. A warning banner at the bottom right indicates that 2 contacts have pending erasure requests.

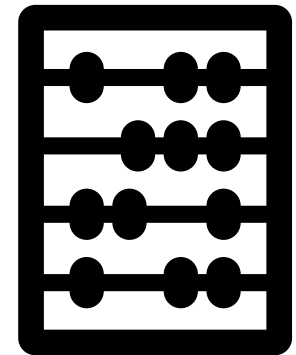
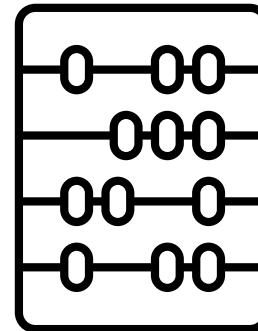
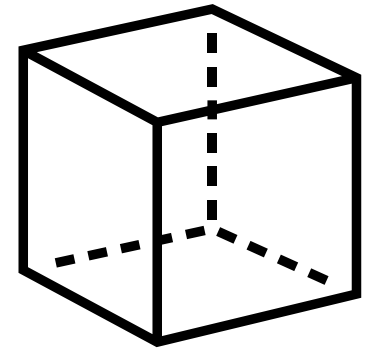
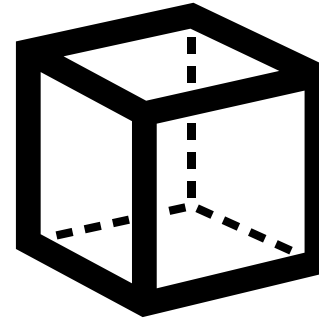
Metric	Value
Total individuals	5,576
Total organizations	286
Unique logins past 3 months	5
Recent posts past 3 months	0

Region	Count
Australia	~800
Caribbean	0
Europe	~1,500
North Am	~3,500
South Am	0
Asia	~100



What is an iPart/DCI?

- Basic building blocks of any RiSE-based website
- Unique configuration options
- Each fulfills a particular purpose
- Re-usable
- 135 officially documented iParts available





Most Common iParts/DCI

- Content HTML
- Query Menu
- Content Collection Organizer
- Panel Editor



Event Name	Start Date	City	Total Registrants	Capacity	Total Revenue
Walk for the Cause	10/5/2022		0	0	0.00
Islands	12/31/2022		11	1000	825.00

Recent and upcoming | Top events | Top attendees | Data integrity

Event Name	Start Date	City	Total Registrants	Capacity
Walk for the Cause	10/5/2022		0	0
Islands Race	12/31/2022		11	1000

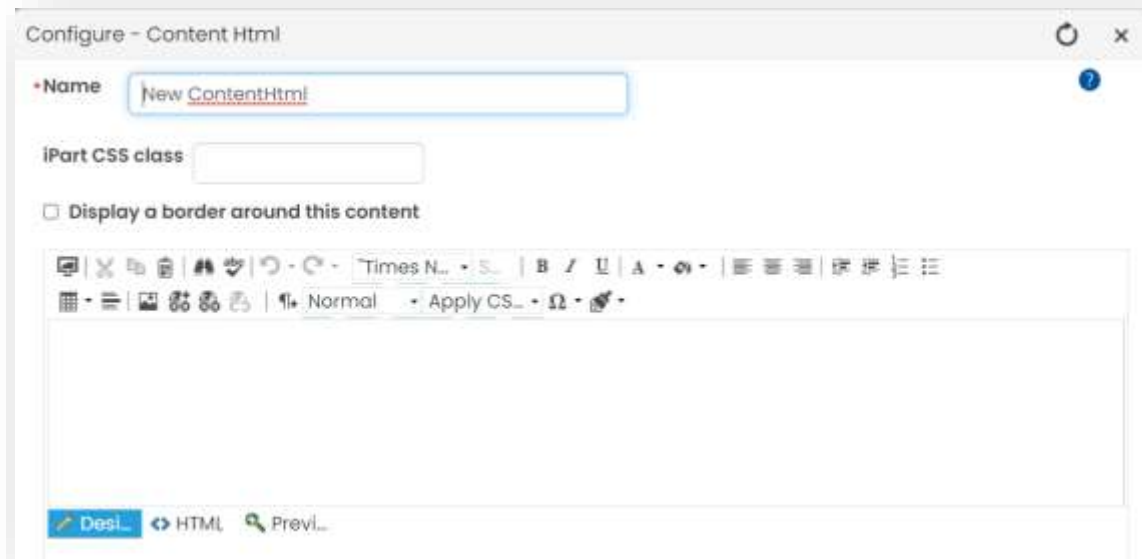
Contact details

Status: Active	Functional title: (None)
Mobile phone: [input]	Major key: [input]
Work phone: [input]	Date added: 10/21/2022



- Simple, static content
 - Text, links/buttons, images, etc.
- “WYSIWYG” text editor
- HTML mode for advanced users
 - JavaScript allowed

https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Content_Html





Query Menu

- IQA queries displayed/used on any page
- Query filters become a search
- Notable configuration options:
 - Open links in a pop-up window
 - Export results to Excel, PDF, etc.
 - Map query results

https://help.imis.com/enterprise/features/rise/dynamic_content_items/utility_gallery.htm#Query_Menu

Enter search criteria to find people

Select a query
By all common criteria

First name starts with Last name starts with City starts with

State/Province Country ID

Organisation starts with Primary email starts with Customer type

Page size: 20 5635 items in 282 pages

ID	Name	Title	Organisation	Address	Primary Email	Status	Customer Type
10734	Lynday Aaron	Lead Biologist	AAS	PO Box 9889 Armadale, VIC 3143 AUSTRALIA	lyndeyaroon@malikator.com	A	Non-Member
2080	Mrs. Patisco Aaron	Industrial Analyst	Frisser's Systems	303 Wexander Street Whitehorse, VT Y1A 21C CANADA	patiscearoon@malikator.com	A	Regular Member



- Displays RiSE content pages as tabs
 - Can point to folder instead of individual pages
- Notable configuration options
 - Function as a step-by-step wizard
 - Set default tab
 - Tab display style – horizontal VS vertical
- Respects access settings of the tab page

https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Content_Collection_Organizer

The screenshot shows a web interface for configuring a content item. At the top, there are links for "Add Content" and "Edit Zone Properties". Below this is a header bar for "New ContentCollectionOrganizerCommon" with action links: "Configure", "Copy To", "Move To", "Connect", "Minimize", and "Remove". A blue-bordered box contains the text: "This dynamic content item will run as a tabbed dialog." Below this, there are four tabs: "Recent and upcoming" (which is selected and underlined), "Top events", "Top attendees", and "Data integrity". At the bottom, there are two bullet points: "• This tab will display the following content record: **Recent and upcoming events**" and "• Content record location: @/iCore/Staff_Dashboards/Events/Recent_and_upcoming_events".

- Displays custom, user-defined database fields
 - Including single-instance, multi-instance, standalone (20.3)
- Users can view/add/edit/delete their own data (if configured)
- Can create new user-defined tables/fields
 - Connect to contact, event or standalone

https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Panel_Collection_Editor_configuration_options

The image displays two overlapping screenshots of the 'Contact details' form in the Panel Editor. The top screenshot shows a read-only view of contact information. The bottom screenshot shows the same form in edit mode, with dropdown menus and input fields.

Field	Value
Status	Active
Mobile phone	(440)193-3427
Work phone	(905) 549-4560
Functional title	
Major key	10845
Date added	11/6/2019

- Contact Mini Profile
- Forms
- Group List Editor
- Report Display
- Panel Collection Editor
- Big Button Panel
- Content Block
- Content Tagged List
- Data Showcase
- Open Invoice List Display
- Social Share
- Related Items
- Query Chart Viewer

Dynamic Content Items (iParts) ▲

Configuring content items

Commerce gallery

Communities gallery

Contact gallery

Content gallery

Events gallery

Finance gallery

Fundraising gallery

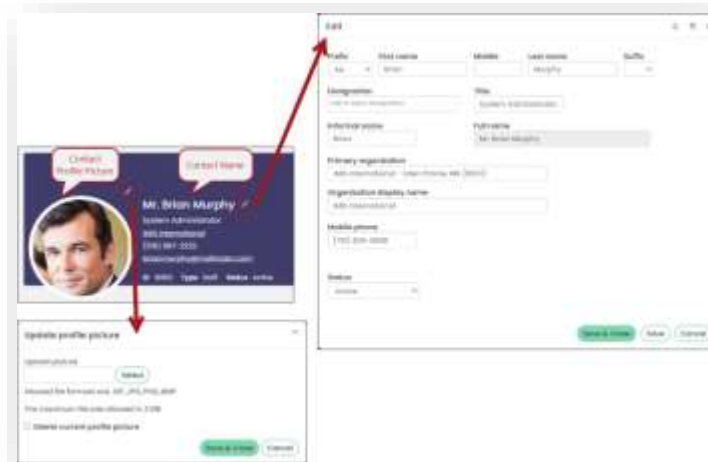
Groups gallery

Utility gallery

Website gallery

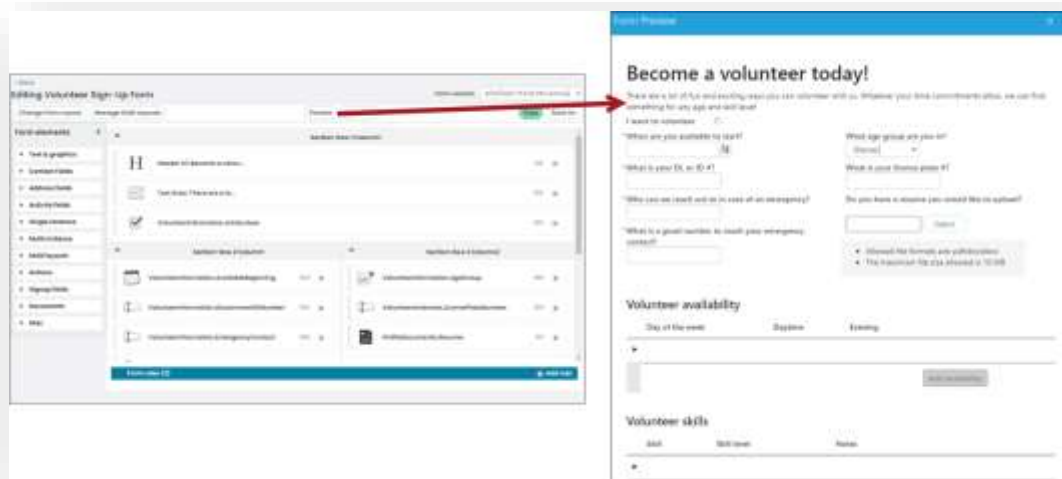
- Notable configuration options
 - Choose the fields to show: photo, title, name (with link), organization, club, mobile phone, prefix, designation, etc.
 - Allow editing
 - Require selection – organization and/or club
 - Ability to list appropriate organizations or club based on the record

https://help.imis.com/enterprise/features/rise/dynamic_content_items/contact_gallery.htm#Contact_Mini_Profile



- Displays [form builder](#) – allows user to add/edit content
- Can be used for:
 - New contact account creation (individual/organization)
 - Dupe checking – email, query
 - Data collection for anonymous (non-logged in) users
 - Use any fields from iMIS – contact, address, user-defined, etc.

https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Forms





Group List Editor

- Display and manage lists of groups/sub-groups/relationships/memberships
- For each group, display title, profile image, active/expired memberships, link to profile/membership details/both
- Communities, organizations, committees, etc.

Members

Management Interest Group

[Add a contact](#)

- ▶ [Mr. Brodie Archer](#)
- ▶ [Chris Baker](#)
- ▶ [Mr. Robert L. Baker](#)
- ▶ [Dominique Barclay](#)
- ▶ [John M. Barry](#)
- ▶ [Ms. Elaine M. Beauchamp](#)

- Displays an SSRS report
- Different than SSRS Report Content Item:
 - Doesn't require IQA or SSRS runtime object
- Stands alone on a content record (otherwise breaks)
- Limit users
 - Pass ID in URL and report

https://help.imis.com/enterprise/features/rise/dynamic_content_items/utility_gallery.htm#Report_Display

The screenshot shows an invoice from IMIS International. The header includes the company name and address: 3309 Duke Street, Alexandria, VA 22334. The invoice number is 84142, account is 15348, and the date is 12/27/2017. It lists 'Bill To' and 'Ship To' information for Mrs. Teresa Spain, Assistant Director, Versatex US, in Los Angeles, CA. The description is 'Website Series, Industry Ethics'. A table below shows one line item: 'Live Access Only' with a quantity of 1, a unit price of 75.00, and an extended price of 75.00. The summary section shows a subtotal of 75.00, an invoice total of 75.00, payments of 0.00, and a balance of 75.00.

Qty	Description	Unit Price	Extended Price
1	Live Access Only	75.00	75.00

Subtotal: 75.00
 Invoice Total: 75.00
 Payments: 0.00
 Balance: 75.00

The screenshot shows a configuration form with the following settings:

- Do not render in design mode
- Display a border around the content
- Display the PDF Export button
- Display the Excel Export button
- Document system path to the SSRS Report template: select
- Hide the parameter section
- Toolbar:
 - Display full toolbar
 - Hide the toolbar
 - Hide the page navigation controls on the toolbar
 - Hide all toolbar controls except the Print button
- Limit users who can view data for other contacts
- Inspect query string for parameters:
 - Hide the parameter option if a value has been passed in via the URL
- Inspect Session for parameters



Panel Collection Editor

- Display multiple panels in tabbed interface similar to Content Collection Organizer
- Display options:
 - Height
 - Width
 - Button location
- Allow editing/deleting of data



https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Panel_Collection_Editor_and_Panel_Editor



- Display sitemap-based links
- Or non-sitemap-based links
 - Can accept URL parameters
 - Can use on behalf of
- With image/icon
- Display as text, buttons, drop-down

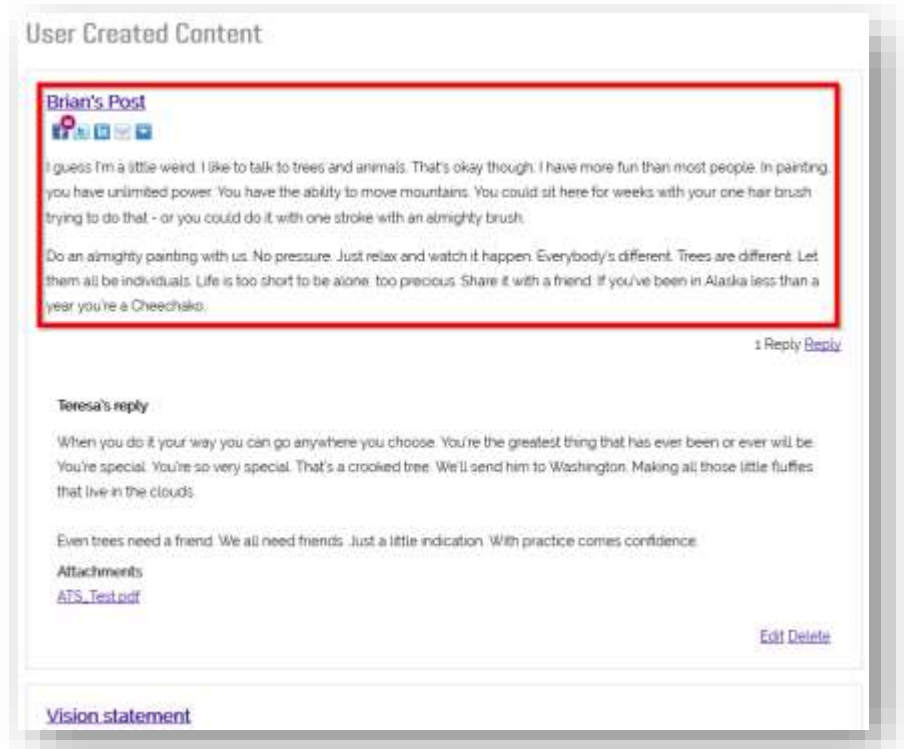
The screenshot displays a user profile for Alex Morgan, President of Vantage US. The profile includes a circular profile picture, name, title, organization, phone number, and email address. Below the profile information is a 'Big Button Panel' with an 'Actions -' dropdown menu and a 'Renew Now' button. The dropdown menu lists various actions such as 'Email', 'View public profile', 'Print info', 'Donate', 'Order', 'Register', 'Generate renewal', and 'Resolve duplicates'. A red arrow points from the 'Generate renewal' action to a table of invoices. The table has columns for 'Pay', 'Invoice', and 'Date'. Below the table is another 'Actions' dropdown menu with a list of actions and their corresponding icons and labels. The actions include 'Link field', 'Email', 'View public profile', 'Print info', 'Donate', 'Order', 'Register', 'Generate renewal', and 'Resolve duplicates'. The 'Generate renewal' action is highlighted with a red arrow.

Pay	Invoice	Date
<input type="checkbox"/>	85024	3/23/2

Link field	Link target	URL Parameter	DB
Email	--CreateCommunication	PartyId-globaledit	100
View public profile	--Profile	Id-globaledit	100
Print info	--Profile	Id-globaledit	100
Donate	--ViewInfo	Id-globaledit	100
Order	--Info	Id-globaledit	100
Register	--MailInforms	Id-globaledit	100
Generate renewal	--ViewStatus/View/Generate	PartyId-globaledit	100
Resolve duplicates	@/Case/View/Duplicate_Merge	Id-globaledit	100

https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Big_Button_Panel

- Allow users to create/edit content
 - Must be Content Authority Group with Content Editor permissions
 - Full iMIS license not required
 - Child pages allowed
- Authenticated users can reply
 - With HTML
 - Attachments allowed



The screenshot displays a 'User Created Content' interface. At the top, it says 'User Created Content'. Below this, there is a post titled 'Brian's Post' with social media sharing icons. The post text reads: 'I guess I'm a little weird. I like to talk to trees and animals. That's okay though. I have more fun than most people. In painting, you have unlimited power. You have the ability to move mountains. You could sit here for weeks with your one hair brush trying to do that - or you could do it with one stroke with an almighty brush. Do an almighty painting with us. No pressure. Just relax and watch it happen. Everybody's different. Trees are different. Let them all be individuals. Life is too short to be alone. too precious. Share it with a friend. if you've been in Alaska less than a year you're a Cheechako.' To the right of the text is a 'Reply' button. Below the post is 'Teresa's reply' with the text: 'When you do it your way you can go anywhere you choose. You're the greatest thing that has ever been or ever will be. You're special. You're so very special. That's a crooked tree. We'll send him to Washington. Making all those little fluffies that live in the clouds. Even trees need a friend. We all need friends. Just a little indication. With practice comes confidence.' Below the reply is an 'Attachments' section with a link to 'ATS_Test.pdf'. At the bottom right of the reply area is an 'Edit Delete' button. At the bottom of the page, there is a 'Vision statement' link.

https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Content_Block

- Based on defined tags
 - Can be set at page or folder level
- Dynamically generated list of content
- Content can be syndicated to multiple locations across site
- Configurable output format

iMIS Latest Executive Guide Shares Best-Practices to Help Fundraisers Improve Performance

Posted on 9/1/2021

iMIS, a leading global provider of software and services for associations and non-profits.

New Industry Regulations

Posted on 10/15/2021

The new regulations for our industry go into effect in six months and will impact how you conduct business.

Industry Certification and You

Posted on 10/15/2021

In an increasingly regulated world, professional certification ensures that you're ready to meet the requirements of licensing, from local to state to national to international.

Volunteer Appreciation Dinner

Posted on 10/11/2021

Tickets will be on sale beginning next week for the Volunteer Appreciation Dinner.

https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Content_Tagged_List

- Content display combining
 - Dynamic data sources: pull and use data in page content (Available sources: Party, Event, Item)
 - With HTML
- Can employ conditional logic

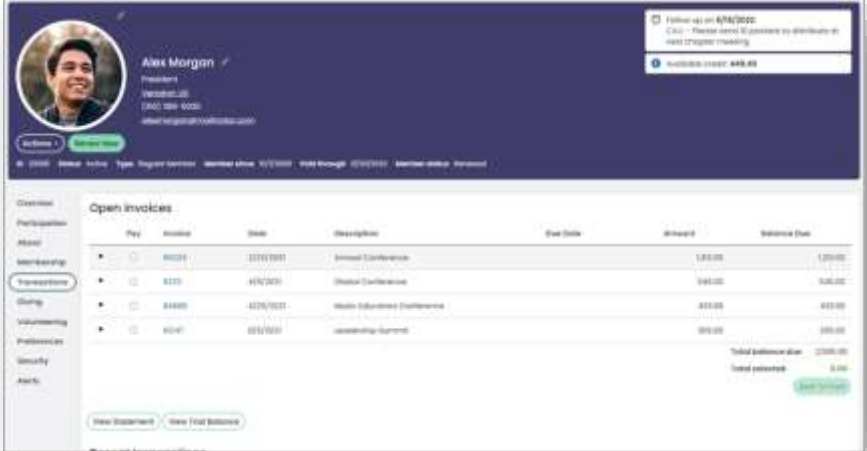
https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Data_Showcase

Which type of membership is right for you?

ASSOCIATE MEMBERSHIP	REGULAR MEMBERSHIP	STUDENT MEMBERSHIP
<p>Associate membership is perfect for pre-professionals and vendors. Receive discounts on events and store products as well as special networking and exhibit opportunities.</p>	<p>Members enjoy many benefits including professional networking opportunities, our monthly industry magazine, discounts on events and in the shop and up-to-date information on industry news.</p>	<p>Deeply-discounted student membership is offered to anyone currently attending a two- and four-year institutions offer mentoring, internships and student SIGS for pre-professionals.</p>
<p>Join - associate</p>	<p>Join - regular</p>	<p>Join - student</p>

Open Invoice List Display

- Users can pay open invoices
- Utilize on individual/organization records
- Configure to
 - Limit based on the financial entity
 - Determine what to display if there are no open invoices
 - Select the invoice types to include
 - Set the days due within
 - This is disabled by default. And when enabled, the default is 60.

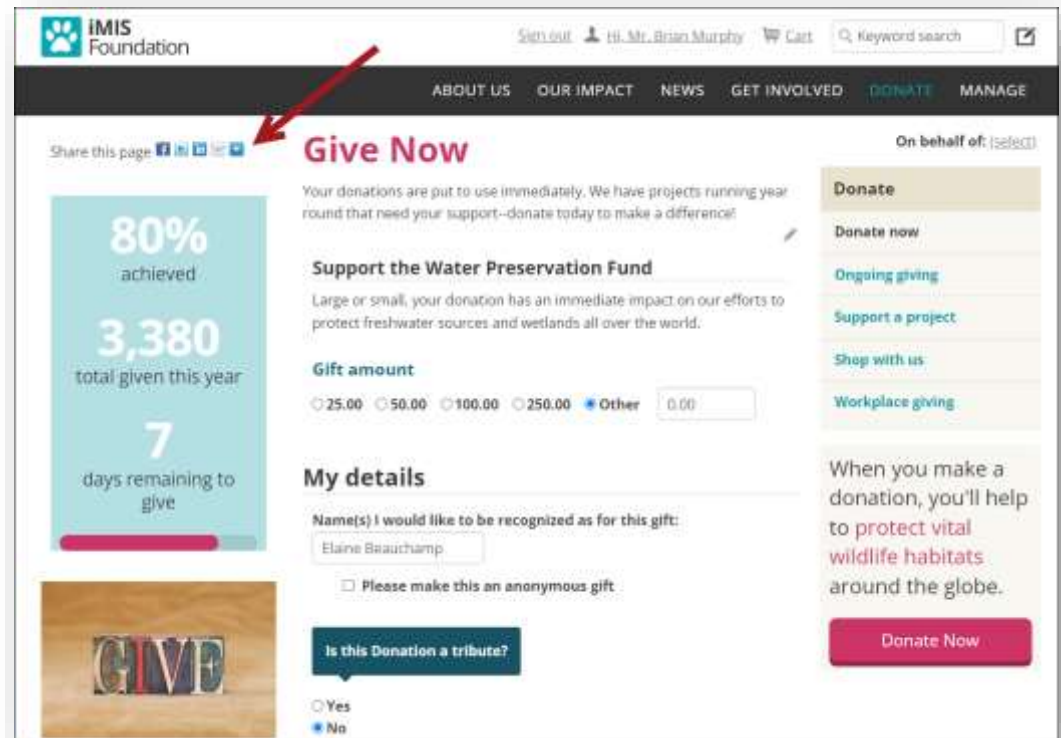


The screenshot shows a user profile for Alex Morgan with a list of open invoices. The table includes columns for Pay, Invoice, Date, Description, Due Date, Amount, and Balance Due. The total balance due is \$204.00.

Pay	Invoice	Date	Description	Due Date	Amount	Balance Due
0001	0001	01/01/2021	Annual Conference		100.00	100.00
0002	0002	01/01/2021	Global Conference		100.00	100.00
0003	0003	01/01/2021	Webinar Conference		100.00	100.00
0004	0004	01/01/2021	Membership Renewal		100.00	100.00
					Total balance due:	\$204.00
					Total entered:	\$0.00

https://help.imis.com/enterprise/features/rise/dynamic_content_items/finance_gallery.htm#Open_Invoice_List_Display

- Display icons to share to social networks and email
- Web site visitors spread your message
- Configuration settings
 - Default page url, or specify different
 - Choose icon size



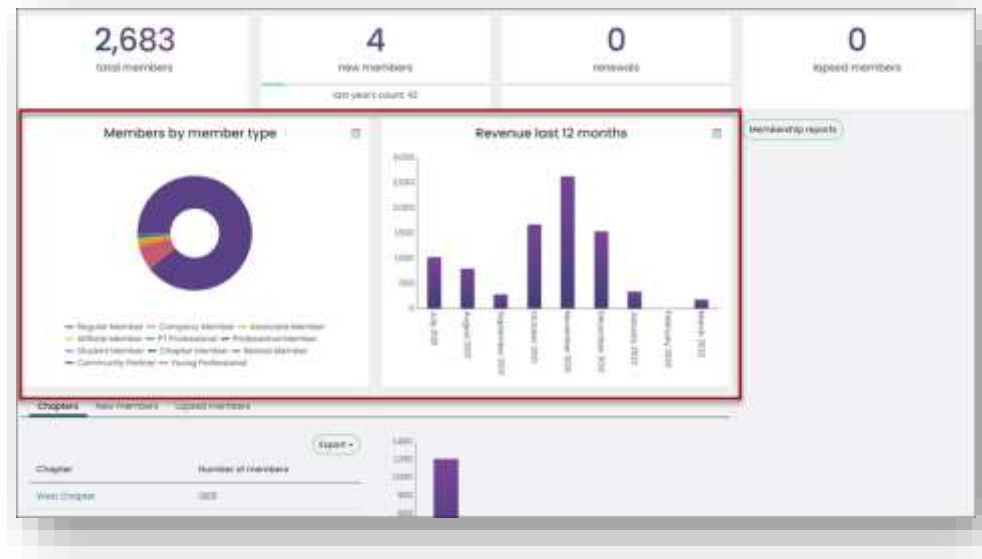
https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Social_Share

- Display profiles or products based on IQA query
- Horizontal/vertical display options
- Can link to any URL

https://help.imis.com/enterprise/features/rise/dynamic_content_items/commerce_gallery.htm#Related_Items

The screenshot displays a product page for 'Association CEO's Guide'. At the top right, there is a 'Continue Shopping' button. The product title is 'Association CEO's Guide'. Below the title is a small image of the book cover and a descriptive paragraph: 'The Association CEO's Guide to Improving Organizational Performance - How to make sure your business strategy drives your technology investments, by Bob Alves and Don Robertson. We provide the hands-on tools you need - proven best-practice strategies, solutions to problems, self-assessments, and results-based case studies from real clients to help you gain insight into what you must do if you want to adapt to the massive changes upon us.' The pricing information shows a 'Discounted member price' of 95.99 and a 'Your price' of 39.99, with a note 'You could save: 35.0%'. There is a 'Quantity' input field and an 'Update Cart' button. At the bottom right of the product section, there is a 'Proceed to Checkout' button. Below the product section is a 'Similar products' section, which is highlighted with a red border. It contains six product thumbnails with their titles: 'EXAM Certification Practice Exam', 'Conference Proceedings', 'Software Basics: New Hybrid Edition', 'Going Mobile Workbook', 'Social Media Fundraising', and 'Building a Strong Team'.

- Displays query results in a chart
- IQA display columns are data columns in iPart configuration
- Chart type options
 - Area
 - Line
 - Bar (horizontal or vertical)
 - Bubble
 - Donut (yummy)
 - Funnel
 - Pie
 - Pyramid
- Formatting chart options



https://help.imis.com/enterprise/features/rise/dynamic_content_items/utility_gallery.htm#Query_Chart_Viewer

- Change Logon Password
https://help.imis.com/enterprise/features/rise/dynamic_content_items/contact_gallery.htm#Change_Logon_Password
- Communication Preferences Editor
https://help.imis.com/enterprise/features/rise/dynamic_content_items/contact_gallery.htm#Communication_Preferences_Editor
- Contact Address Editor
https://help.imis.com/enterprise/features/rise/dynamic_content_items/contact_gallery.htm#Contact_Address_Editor
- Slideshow
https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Slideshow
- Video Player
https://help.imis.com/enterprise/features/rise/dynamic_content_items/content_gallery.htm#Video_Player
- Event Calendar
https://help.imis.com/enterprise/features/rise/dynamic_content_items/events_gallery.htm#Event_Calendar
- Donation Creator
https://help.imis.com/enterprise/features/rise/dynamic_content_items/fundraising_gallery.htm#Donation_Creator
- Common Search
https://help.imis.com/enterprise/features/rise/dynamic_content_items/utility_gallery.htm#Common_Search
- Contact Us
https://help.imis.com/enterprise/features/rise/dynamic_content_items/utility_gallery.htm#Contact_Us



Questions & Answers



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atsol.org/Webinars

schedule of upcoming webinars

Past Webinars

atsol.org/PastWebinars

*video recordings and
downloadable presentation slides*

ATS Learning Center

atsol.org/ATSLearningCenter

Other Questions

Email: info@atsol.org

Online: atsol.org

Phone: (720) 945-7252



Content Browser (Not an iPart)

- Only available on-premise (not EMS)
- Typical location C:\Program Files (x86)\ASI\iMIS0\net\bin\ContentBrowser.exe
- Find pages on which a particular iPart is being used
- Get list of all iParts used on a specific page

https://help.imis.com/iMIS2017/Implementation/Administration/Using_the_Content_Browser_utility.htm

The screenshot displays the Content Browser utility interface, which is used for managing content and iParts. It is divided into several panes:

- Left Pane:** A tree view showing the content structure, including folders like 'Core', 'Samples', 'Shared_Content', 'ANG', 'AOST', and 'Certification_Home'.
- Document Properties:** A form showing details for a selected document, such as 'Document Name (Publish File Name)', 'Alternate Name (Title)', 'Document Version Key (Content Key)', 'Access Setting', 'Document Code (Content Code)', 'Document Path (Content Path)', 'Created On', 'Created By', 'Updated On', and 'Updated By'.
- Referencing Navigation:** A table showing the relationship between iPart names, content names, and fully qualified iPart names.
- All iParts Referenced By Content:** A list of iParts used by the selected content, including 'Address Mapper', 'Advanced Accounting Console', 'Alert Display', 'Alert Set Creator', 'Authorization Provider', 'Auto Pay Instructions Creator', 'Automatic Payment Enrollments', 'Batch Invoice Payment Processing', 'Big Button Panel', 'Billing Item Creator', 'Cart Charges Display', 'Cart Checkout Button Link', 'Cart Details Display', 'Change History Display', 'Change Login Password', 'Content Search', 'Communication Creator', 'Communication Preferences Editor', 'Confirmation Display', 'Contact Account Creator', 'Contact Address Editor', 'Contact Communities', 'Contact Mail Profile', 'Contact Profile Picture', 'Contact Sign In', 'Contact Status', 'Content Block', 'Content Collection Organizer', 'Content File', 'Content HTML', 'Content Link', 'Content Tagged List', 'ContentWebUserControl', 'Continue Shopping Button Link', and 'Date Showcase'.
- All Content Containing Selected iPart:** A table listing content items that reference the selected iPart.

iPart Name	Content Name	Fully Qualified iPart Name
Social Share	About Us Social Share	As\Web\Pages\Social\SocialShare
Content HTML	Our Organization	As\Business\ContentManagement\ContentHTML
Content Tagged List	New ContentTaggedList	As\Business\ContentManagement\ContentTaggedList
ContentWebUserControl	Community	As\Business\ContentManagement\ContentWebUserControl

Content Name	Alternate Name	Publish Location
Giving_History	Giving History	~/Core/Website/Contacts/Giving_History.aspx
Giving_History_Staff	Giving History Staff	~/Core/Website/Contacts/Giving_History_Staff.aspx
Activity_Profile	Activity Profile	~/Core/Contacts/ContactLayouts/Activity_Profile.aspx
Account_Page_Staff	Account Page Staff	~/Core/Contacts/ContactLayouts/Account_Page_Staff.aspx
Account_Page	Account Page	~/Core/Contacts/ContactLayouts/Account_Page.aspx
About_Me	About Me	~/Core/Contacts/ContactLayouts/Donor/About_Me.aspx
Profile	Profile	~/Core/Contacts/ContactLayouts/Profile.aspx
Account_Staff	Account Staff	~/Core/Contacts/OrganizationLayouts/Account_Staff.aspx
Account_Page	Account	~/Core/Contacts/OrganizationLayouts/CoAdmin/Account_Page.aspx
Demographics	Demographics	~/Core/Contacts/OrganizationLayouts/Demographics.aspx
Organization	Organization	~/Core/Contacts/OrganizationLayouts/Organization.aspx
Organization_Profile	Profile	~/Core/Contacts/OrganizationLayouts/Organization_Profile.aspx
Overview	Overview	~/Core/Contacts/OrganizationLayouts/Overview.aspx
Manage_Donor	Manage Donor	~/Core/Fundraising/Manage_Donor.aspx
Profile	Profile	~/Samples/AnnualConference/Mobile/Profile.aspx
MemberHome	Member Home	~/Samples/Member/MemberHome.aspx
My_Account	My Account	~/Samples/MemberR/Contact_Management/My_Account.aspx
My_Participation	My Participation	~/Samples/MemberR/Contact_Management/My_Participation.aspx
Organization_Profile	Organization Profile	~/Samples/MemberR/Contact_Management/Organization_Profile.aspx
My_Announcement	My Announcement	~/Samples/Mobile/Contact_Management/My_Announcement.aspx