

iMIS 15.1

Maximise your potential

Presented by: Colin Bryant

Session Overview

- Introductions
- Where are you headed in 2009
- How do we get there?
 - Back to Basics
 - Extend to the web– 15.0 recap and 15.1 Overview
- More Information
 - Webcasts, Training, Online Information, NiUG
- Promotions

Introductions

iMIS¹⁵

- Colin Bryant
 - Director – Customer Sales
 - Customer for Life
 - Working with iMIS since 1994
- Over to you...

Where are you headed in 2009

iMIS¹⁵

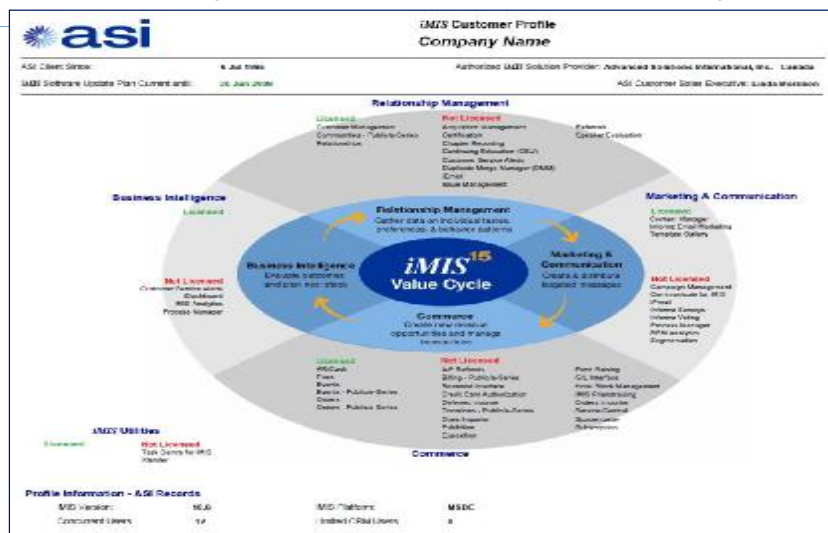
- Do you have a 2 or 5 year plan?
- What is influencing business in 2009?
 - GFC
 - Staffing
 - Constituents (Donors, Members, Customers)
 - Web – e-Commerce, online access
- Payflow Pro Support for Credit Card Authorisation (e-Series, iBO, Desktop)
 - If using Payflow Pro customers must be on 10.6.30.17 or 15.x by 31 August 2009

How do we get there? – Back to Basics

iMIS¹⁵

- Review your *iMIS* usage every 1-2 years
 - How do you fit with the *iMIS* Value Cycle
- Review the *iMIS* Enhancements Catalog
- Make sure you are using what you already own
- You don't know what you don't know....
- Online Webcasts
- Training – staff competency

How do you fit the *iMIS* Value Cycle



Training and Webcasts

- Training
 - Scheduled (Melbourne/Sydney)
 - At Your Desk
 - Onsite (custom)
 - www.advsol.com/training
- Webcasts
 - Scheduled – online weekly
 - Recorded
 - www.advsol.com/webcasts



The screenshot shows a web browser window displaying the ASI website's resources page. The page is titled "resources" and features a navigation menu with options like "Home", "Resources", "Webcasts", and "Contact Us". The main content area is titled "Webcasts" and lists several upcoming and past webcasts. Each entry includes a date, a title, and a brief description. For example, one entry is dated "Tue, 9 Jun 10 11:00 AM" and titled "Introduction to iMIS 15". The page also includes a sidebar with navigation links and a footer with the ASI logo and website URL.

How do we get there? – Extend *iMIS* to the web

- Customers increasingly EXPECT that EVERYONE is on the web
- Customers expect the web to be connected to their record
- Customers look at the web first, everything else second...
- *iMIS* 15 – is web-enabled – improve your customer experience by connecting your *iMIS* information to your website

iMIS 15.0 Recap


- Launched in Australia/NZ Feb 2008
- .NET Requirement
 - *iMIS* published as a webpage
- 3 User Types
 - Full
 - Casual (CRM)
 - Public
- Unified User Login
- Events Public View wizard and other Public View components for Orders, Billing, Customer

iMIS 15 – who is using it?

- % of *iMIS* Customer Globally using i15




15.1 – how do I get it?



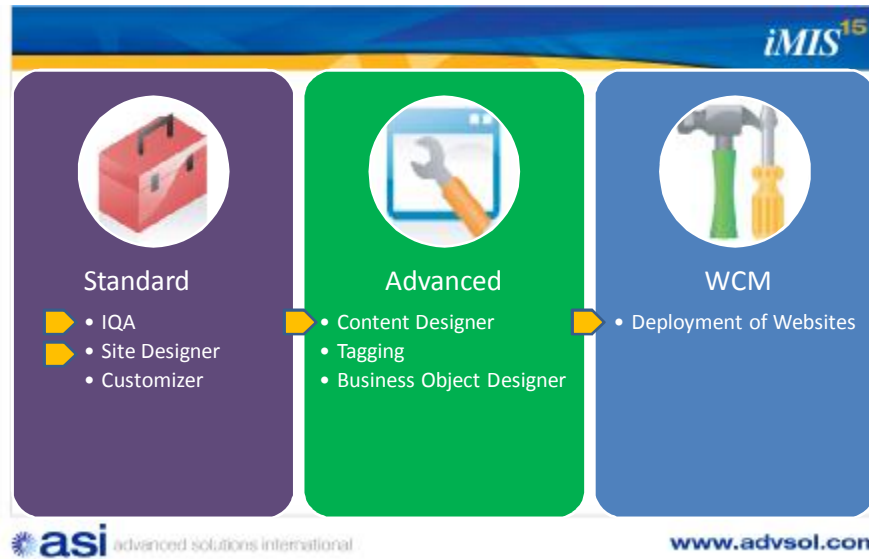
- New Features, System Requirements and other documents
 - docs.imis.com/15.1
- Download the Install
 - www.advsol.com/customer
 - Go to Support>>Product Releases

15.1 New Features Overview



- *iCreate Standard*
 - IQA and SSRS Reporting
 - Site Designer
- *iCreate Advanced*
 - Content Layout Configuration
 - Content Designer
 - Tagging
- Enhancements to the Public Views
- Communities (.NET version)
- WCM - .NET Content Manager

iCreate Suite



iCreate – Extend *iMIS*



IQA Enhancements

Standard
• IQA
• Site Designer
• Customizer

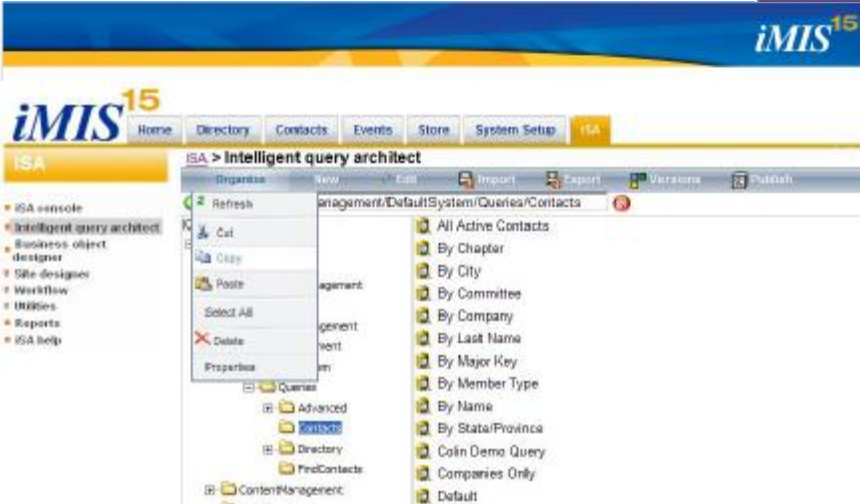
iMIS¹⁵

- IQA – interface and document management system easier to use
- Addition of Subtotals option for report creation
- Integration with Microsoft SQL Server Report Services (SSRS)
 - IQA is the report writer
 - Puts report writing in the hands of the users
 - Report Viewer is free with *iMIS*
 - Use MS Visual Studio to modify

Doc Mgt Improvements

Standard
• IQA
• Site Designer
• Customizer

iMIS¹⁵



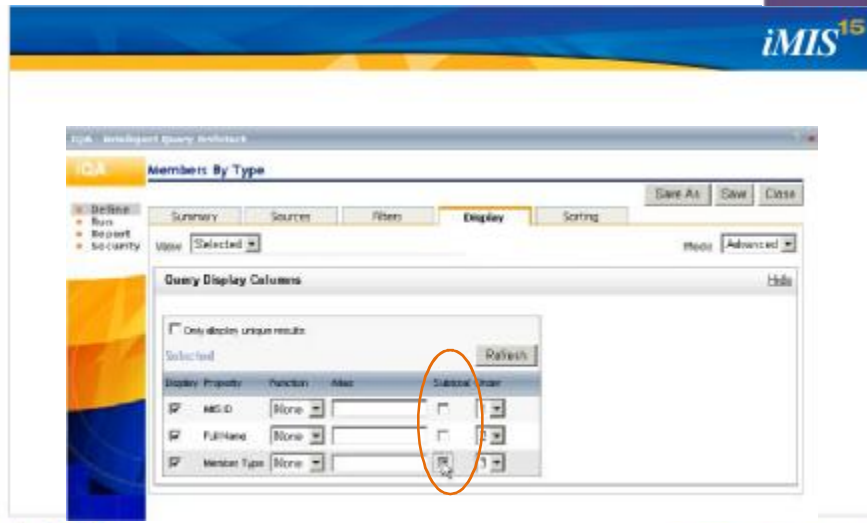
ISA > Intelligent query architect

Queries

- All Active Contacts
- By Chapter
- By City
- By Committee
- By Company
- By Last Name
- By Major Key
- By Member Type
- By Name
- By State/Province
- Colin Demo Query
- Companies Only
- Default

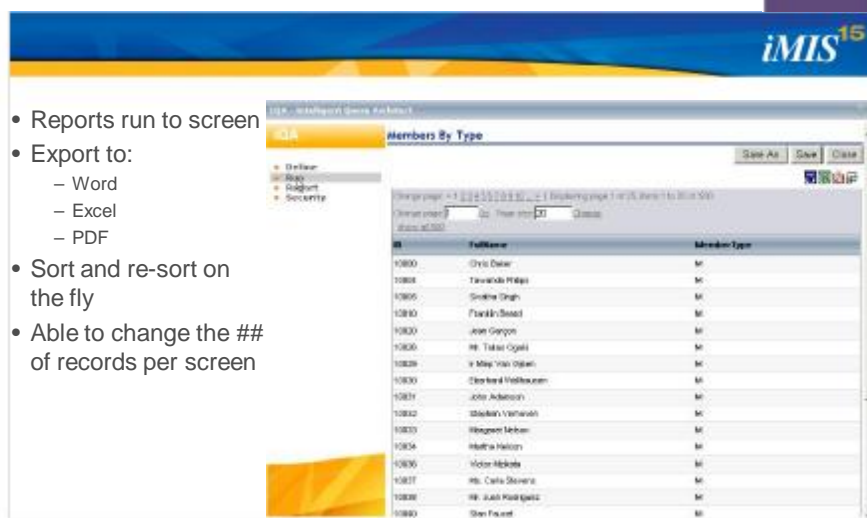
IQA – Subtotal Option

Standard
• IQA
• Site Designer
• Customizer



Standard Results

Standard
• IQA
• Site Designer
• Customizer



- Reports run to screen
- Export to:
 - Word
 - Excel
 - PDF
- Sort and re-sort on the fly
- Able to change the ## of records per screen

IQA to SSRS Reports

Standard
• IQA
• Site Designer
• Customizer

- New Report option for IQA
- Subtotalling will appear in the report
- Able to save this report as a standard report to *iMIS*
- Able to use Visual Studio to edit the report and enhance as required

| State/Province | Country | Amount |
|------------------------------|----------------|-------------------|
| SA | Australia | 4,420.00 |
| NSW | Australia | 3,135.00 |
| QLD | Australia | 6,475.00 |
| ACT | Australia | 752,745.00 |
| WA | Australia | 7,250.00 |
| TAS | Australia | 2,915.00 |
| Count of Australia: 8 | | 815,880.00 |
| United Kingdom: | | |
| Northampton | United Kingdom | 295.00 |
| Wiltshire | United Kingdom | 2,100.00 |
| West Sussex | United Kingdom | 225.00 |
| Abendshire | United Kingdom | 810.00 |
| Devon | United Kingdom | 21,480.00 |
| Avon | United Kingdom | 610.00 |
| Avon | United Kingdom | 720.00 |
| Cheshire | United Kingdom | 300.00 |

Site Designer

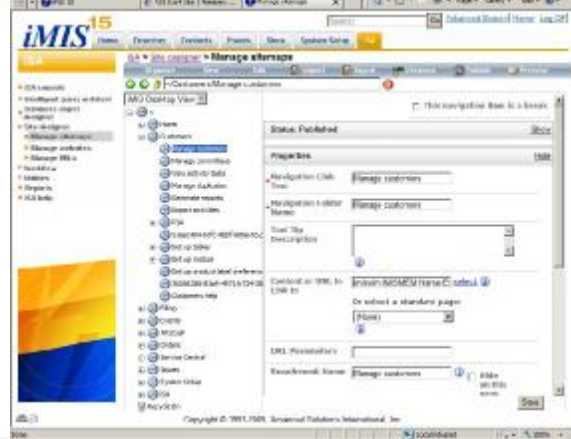
Standard
• IQA
• Site Designer
• Customizer

- Manage navigation
 - *iMIS* Desktop
 - *iMIS* Full View
 - *iMIS* Websites
- Create Websites
 - Layout Gallery
- Manage Short URLs

Site Designer

Standard
• KSA
• Site Designer
• Customizer

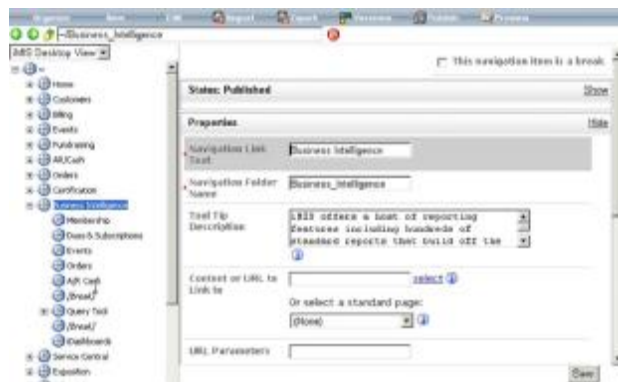
- Tailor *iMIS* to your own organisation
- Rename Navigation items for desktop or Public View websites
- Add new navigation items pointing to third party or other *iMIS* controls



Site Designer

Standard
• KSA
• Site Designer
• Customizer

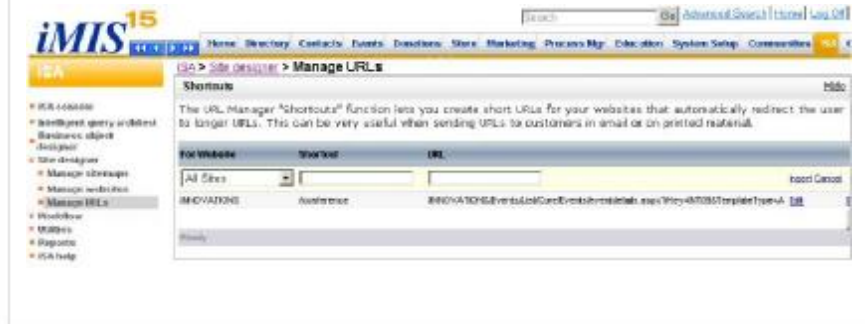
- Consolidate functions into one menu
- e.g. shown – bringing all Reports menus into one Navigation Link of iMIS Desktop



Managing URLs

Standard
• ISA
• Site Designer
• Customizer

- Site Designer includes a feature to allow you to create short-cut URLs to web pages (including Full and Casual User links)



Content Designer

Advanced
• Content Designer
• Tagging
• Business Object Designer

- Build/Manage Content
 - Layout + *i*Parts
- Build custom page layouts
 - Ultimate flexibility
 - Use editor or code it yourself

Tagging

Advanced
• Content Designer
• Tagging
• Business Object
Designer

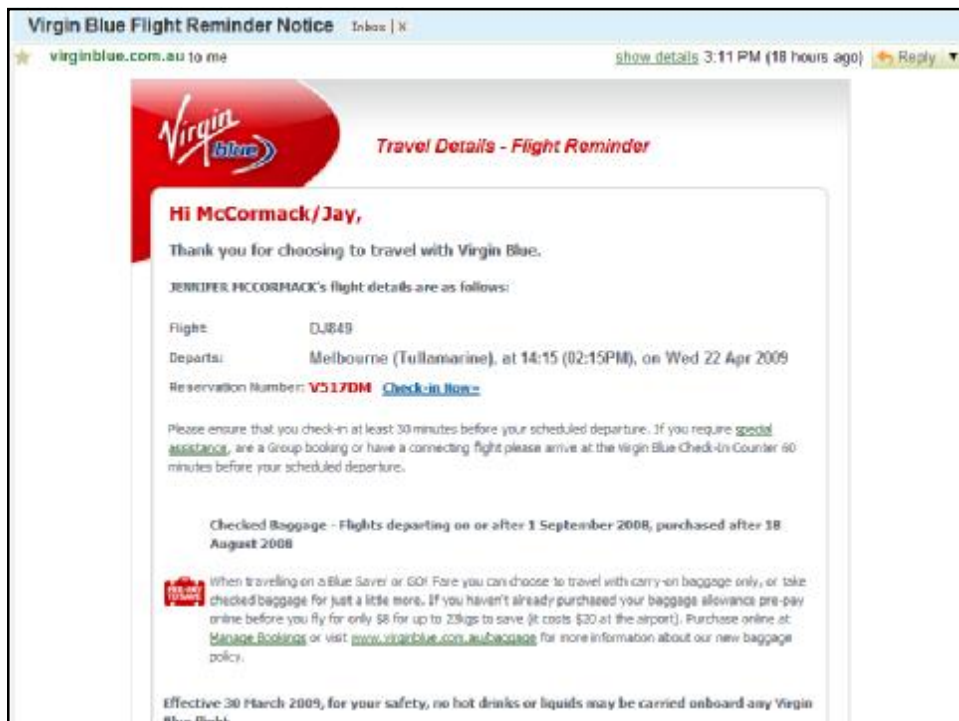
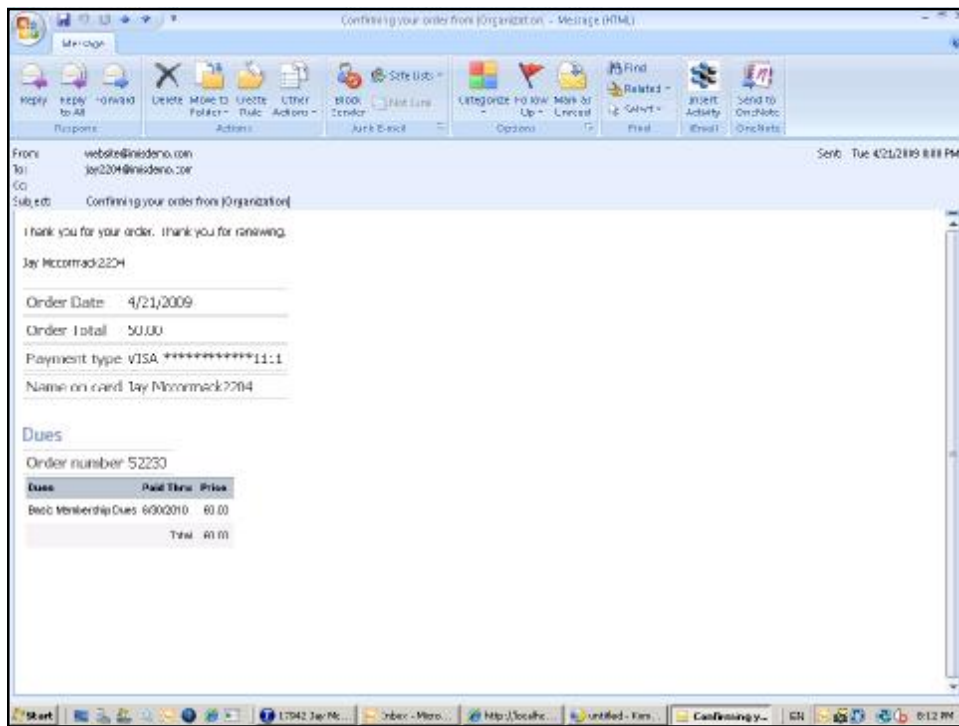
iMIS¹⁵

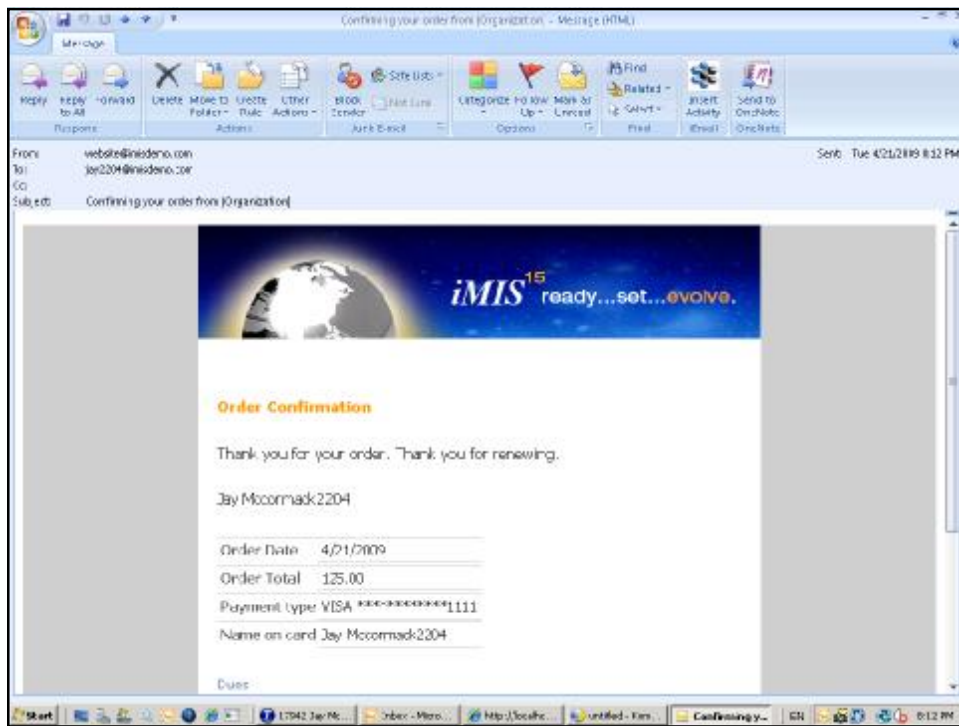
- Providing context to content
- Enables
 - Content arrangement
 - Content search/retrieval
 - Content re-use
 - Content taxonomy
- Hierarchical Inheritance approach

Public Views Enhancements

iMIS¹⁵

- HTML Emails
- Login Improvements including capability to include captcha
- Company Roster online
- Online Donations
- .NET Communities





Tailoring Public View Emails

- Which emails can be tailored:
 - Account Update
 - Create Account
 - Roster Member Company Switch
 - Roster Member removed
 - New Account
 - Order Confirmation Resent
 - Order Confirmation
 - Contact Us
 - Donation
 - Community Report Inappropriate or Offensive
 - Community Notification

Login Workflow

| iMIS ¹⁵ | |
|--|---|
| Event Registration | Account Creation |
| <ul style="list-style-type: none">• Login page flow improved• Create account page flow improved | <ul style="list-style-type: none">• Email confirmation now optional |

Login – New Options

| iMIS ¹⁵ | |
|---|--|
| Login Mgt – Public User | |
| <ul style="list-style-type: none">• Forgotten Username• Forgotten Password | <ul style="list-style-type: none">• Create Account• Captcha Support |
|  |  |

Public – Roster Management

iMIS¹⁵

- Create Account Link to Company
- Company Administrator Role
 - Multiple administrators
 - Update individual records
 - Remove individuals from company
 - Register company individuals or pay membership billing

Online Donations

iMIS¹⁵

- Authenticated or Not Authenticated
- Configurable
 - Gift Array
 - Messages
 - Eligible Distributions
- Multiple Gift Pages

Online Donations

example - Logged in and authenticated

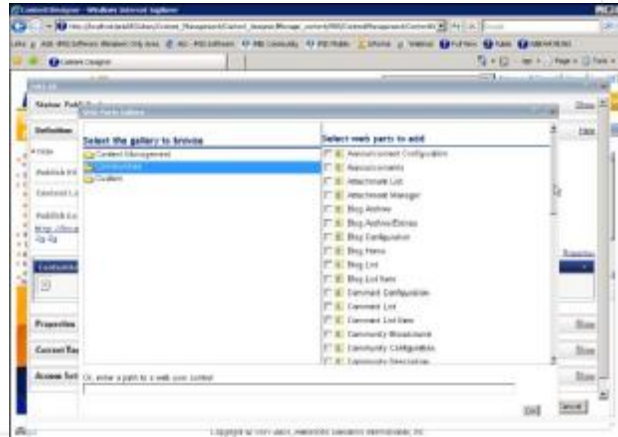
example - No Login required

Communities

- Forums
- Blogs
- Wikis
- Announcements
- Resource Library
- Subscriptions

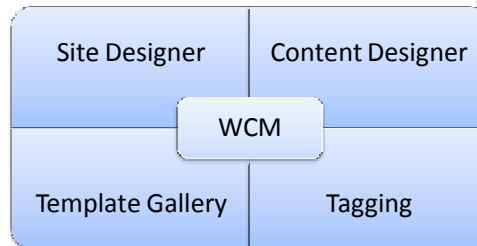
Configure Communities *iParts*

- Communities components are *iParts*
- You can configure Communities




Web Content Management (WCM)

- Build public facing websites
 - Site Designer
 - Template Gallery
 - Content Designer
 - Tagging




15.1



Available now – login to the ASI Website
www.advsol.com/customer

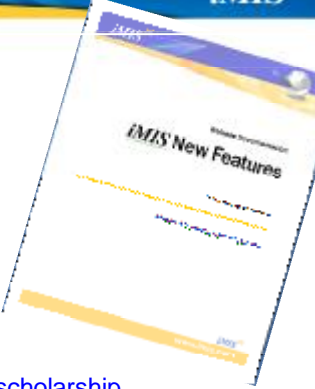
>>Support>>Product Releases

Useful Resources



More about *iMIS*¹⁵ features at
www.imis.com

Documentation: <http://docs.iMIS.com>
Google Search: <http://search.advsol.com>
Users Group: www.NiUG.org
iMIS Community: www.imiscommunity.com
iMIS Community: www.advsol.com/webcasts
iMIS Training: www.advsol.com/training
iMIS Scholarship Fund: www.advsol.com/ap/scholarship



What is NiUG?

iMIS¹⁵

- *NiUG* : International *iMIS* User Group
- Organised in 1996, *NiUG* International consists of several hundred international company members and vendors.
- In January 2007 the *NiUG* Asia-Pacific chapter was formed.
- *NiUG*'s primary focus and mission is to provide ALL *iMIS* users the opportunity to “**Share, Compare, Become More Aware**”.
- *NiUG AP* Committee includes 8 members. Representatives from Australia (Victoria and NSW) and New Zealand.

'Recession Busters'

iMIS¹⁵

Promotions Valid until 30 September 2009

Ready Set Evolve

- *i15* Additional Users at a discount
- Variable discount according to how long you have been with *iMIS* (0%, 20%, 40%, 60%)

Get Smart with *iMIS*

- Buy multiple modules and receive discount on ASI modules*
 - 2 modules – 10%
 - 3 or more modules – 20%

Hosting

- 10% discount on hosting fees when adding hosting as part of your *i15* upgrade

Customer for Life

- Software Update Prepayment – discounts for Prepayment
 - Prepay 2 years (current and one future) – 12% discount
 - Prepay 3 years (current and 2 future) – 15% discount
- - excludes third Party Modules

iCreate Advanced - Offer

iMIS¹⁵

2009 OFFER

- Customers upgrading from *iMIS* 10 to *iMIS* 15 in 2009 can access 'Advanced iCreate' components for no initial cost.
- Customers already on *iMIS* 15 can access these features when they upgrade to *iMIS* 15.1 for no initial cost.

Contact your Customer Sales Executive for more information

Session Review

iMIS¹⁵

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- Where are you headed in 2009
- How do we get there?
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- More Information
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The logo for iMIS 15, featuring the text 'iMIS' in a white serif font and '15' in a yellow sans-serif font, set against a blue background with a yellow horizontal stripe.

iMIS 15.1

Maximise your potential

Have questions or want to learn more?

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Or phone – NZ 0800 230 122