UNCOVER THE MAGIC OF IMIS EMS:

41 EXPERT TIPS YOU CAN'T MISS!

Hear It Straight from the iMIS Gurus: Unveiling the Power of iMIS EMS

ISG
SOLUTIONS LLC

iMIS Engagement Management System (EMS), the latest release of iMIS, runs entirely in the cloud and offers many new capabilities. This powerful version is a game changer — streamlining and simplifying processes from reports and accounting to member engagement and increasing functionality from initial login to dashboards and more.

Like any new or updated software, there is a learning curve with EMS, and of course, there are new, perhaps not always obvious, features and functionalities. Our team is deep in the trenches with EMS, and we've done many migrations. We've seen the terrific impact the change to EMS has made for associations — staff and members.

We are very excited about iMIS EMS and want to share our favorite tips and new capabilities. The insights in this book come from the ISG iMIS team, including a few of the consultants who have worked the most with iMIS EMS. Tips were shared by:

Tonya Abel
Kevin Finkelstein
Amanda Mitchell
Mari Beth Schmersahl
Megan Shankle

Whether you are already using iMIS EMS or are planning your migration, we know you'll find these tips useful!

Amanda Mitchell

Kevin Finkelstein

Mari Beth Schmersahl

Megan Shankle

Tonya Abel

01

Logging into iMIS?

In EMS, your search history is immediately visible, which makes it easy to pick up where you left off. You can also delete the history, so your interface isn't cluttered from the previous day, and you have a clean new start.

02

The EMS refund process is significantly simpler than the same process in iMIS 2017. Just find the payment you want to refund, and with a few clicks, you can credit their account or refund to a credit card, even if you don't have the credit card number. (The card information is in a secure vault, not in EMS.) Additionally, a check that didn't clear can be reversed easily, and unapplied payments can be applied to the correct item.

03

EMS makes it much easier to define and use dynamic groups. You have a central page where you can see all your dynamic groups, search through the list, see the IQA the group was built on, and modify the IQA — with just a few clicks. It is easier than ever to create sophisticated pricing models, such as giving a special price to first-time attendees who are under 40 or having the first registration at a company at the regular price but all others from that same company get a discount. No more keeping track of the groups you created yourself, knowing which IQA you used, and remembering where it was stored.

04

The data integrity dashboard makes it easier to spot missing or invalid data, which helps you maintain clean and useful member information. For example, you can see missing emails or phone numbers, non-alphabetic characters in names, and invalid address data.

05

The data integrity dashboard also lets you identify a locked-out user, click through to their username, and unlock their access or change their password.

06

Custom groups can be created automatically, using IQA queries, and you can have pages that are available only to people who are in the group. For example, you can have a section of the site for board members only, where access is granted 90 days before their term begins and is automatically revoked when their term ends. Members are added to the groups automatically, so there's no need for staff to manually assign people to groups.

07

iMIS Report Writer is a game-changer! You can create — without knowing Crystal Reports or SSRS — very specific and formatted reports that live in iMIS. Instead of having everything done outside of iMIS, the reporting now lives in iMIS, and as more reports are added to the Report Writer, it becomes even easier to copy and modify reports for your purposes.

08

It is less expensive to build reports in EMS — and you get the reports faster because you don't have to ask support to create them for you. Non-technical users can build their own reports using the highly intuitive interface. Users need a staff license to create a report, but people without licenses can access the report if you choose to allow that.

09

Searching is easier. Goodbye Omnis code formulas, out-of-date searches, and rebuilds! With EMS, you can more easily search on multiple values and add an IQA to the search. Now, non-technical staff can do more advanced queries, without Omnis code or knowing SQL.

10

You can attach reports to email templates. For example, you can create invoices and membership cards and attach these personalized documents to emails that come directly from iMIS.

11

EMS improves chapter functionality and allows chapters to draw on the information in iMIS to identify members, create rosters, and make chapter-specific offers. Decision-makers for each chapter are identified and given specific permissions, such as the ability to pull rosters and make dues payments on behalf of members.

12

Chapter templates create a basic page for each chapter, drawing the details from iMIS, with no effort on the part of the chapter. But chapters that are larger or more established can easily create a custom look and feel specific to their chapter and add details about events or activities that are relevant to only their members. Additionally, rules can be controlled at the chapter level, so event promotions can be sent to chapter members, not just people who are local to the geography.

13

In EMS, chapters have more control over roster management. Larger and more active chapters may want to maintain their own individual database, and they can have control over their data by assigning permission to modify records to their chapter admin.

(With iMIS 2017, users were only allowed to modify data from others at their company.)

14

You can use iMIS data with PDF templates that were designed outside of iMIS. For example, you could design a member badge and print it with iMIS member info.

15

The EMS user interface is more streamlined and elegant. The collapsible menu gives you more working screen space.

16

Programmers can insert CSS code into RiSE pages, so all of the pages have the same look and feel as your website.

17

You can provide permission for staff who don't have full iMIS licenses to update pages on your website or perform other tasks that don't involve editing member records or processing financial transactions. For example, a committee admin can add or remove members from their committee.

18

Panels are more user-friendly in EMS. It is easier to set up data sources, display the fields you want on specific panels, and use logging and validation tables to ensure data quality. You can also make certain data fields read-only or require that the information be filled in, with alerts set up to remind members to update the data.

19

With EMS, you can email individuals directly from the iMIS interface, and those emails can incorporate information from that person's member data or a link to make it easier for the recipient to take the desired action. For example, you may be getting ready to send a dues billing, but notice that you only have last year's revenue. You can send a company admin a request to update their company data, such as revenue, staff size, or industry. The email can include the data you have currently plus a link to where they can update the details.

20

A progress tracker iPart can be used to show how close you are to achieving fundraising goals or how many members are attending the annual conference. When you click on the graphic, you drill down into the data.

21

You can create and modify events in one place instead of two — no more worrying about which information is accurate or updating the details in both places.

22

Keyword searches include all the data in iMIS. You can search on "tax," for example, and see all occurrences of that word in products, people, names — everything in iMIS!

23

With customized dues pricing in EMS, associations can price by category, not just by member type. For example, you can have member categories for students, retirees, or journeymen. EMS can also handle complex situations, such as when the state pays membership dues for certain types of members. This functionality minimizes inconvenience for members because they don't have to pay and then apply for reimbursement or refund.

24

Multi-year membership dues are now easier to handle. Instead of using multiple product codes, you can define dues levels based on member type, billing category, and length of membership. For example, you can offer one price for one year, a discount if they sign up for two years, and a larger discount for three years. The prices update automatically and are carried through to the accounting side seamlessly.

25

You can create dynamic pricing groups, so only those with chapter membership or those who meet specific conditions can attend or receive discounted pricing for certain events.

26

EMS makes managing committees easier. You can still search by group, similar to iMIS 2017, but from the search results, you can easily edit committee details, add members to groups, view active/future/past members, and more. You can also search for specific members and click through to view their profiles.

27

The EMS user interface has a substantially better look and feel, especially for member records. The page layout is much more pleasing to the eye, and it is easier for staff to find the information they are looking for. For instance, they no longer have to toggle between the desktop and staff site when dealing with financial data.

28

IQA templates can be used to display member directory information or product listings.

29

You can control permissions, so only chapter members can see the events for their chapter, or perhaps, who from their chapter is attending a specific event.

30

Members can be automatically assigned to dynamic groups based on various criteria. For example, new members can register for events at member pricing or access members-only content immediately upon joining. They don't have to wait for staff to add them to a member group.

31

It is easier for staff to help members with registration issues. Staff can "act as" members, register them for an event, and even override pricing if needed using the "on behalf of" feature. A "pay later" option is available for members who need to pay with a purchase order. Staff can also suppress an order confirmation email, or conversely, send a copy of the confirmation email if it wasn't received.

32

EMS is faster than iMIS 2017! Data sources, in particular, load much more quickly.

33

EMS offers greater control over the visibility of information. You can make certain types of information visible only to people who have specific roles or who have other specific permissions.

34

Conditional redirects offer a way to nest conditions so that people applying for membership get to the right application form. For example, based on the applicant's answers to demographic questions, they can be vectored to an individual application. It can also be used to validate that an applicant's information matches the correct company.

35

Accounting is much simpler, with only one interface instead of two. The interface is easier to navigate and more user-friendly. Everything is in one place, and it's easy to create new reports.

36

Process automation is enhanced in EMS. Staff can set up alerts (for other staff or members) so that when someone logs in, they see reminders to perform certain tasks, such as add their email, pay dues, or update demographics. These tasks can be based on conditions, such as when someone registers for an event, they receive reminders. Tasks can also be triggered when an IQA condition is met or something happens in the database.

37

EMS lets you create a stand-alone reporting site for people who need to access — but not modify — specific information, such as details about an event, financial reports, or member data. You can give these staff members (or chapter admins) view-only access, without paying for a full iMIS license. They can search the data, perform lookups, and export information. They can also access a library of reports you define for them (without permission to change anything). Like other EMS search functions, search history is available if someone wants to pick up where they left off, or the history can be deleted, so the interface isn't cluttered from the previous day.

38 iMIS Forms Plus allows you to build your own Create Account page and require that specific questions are answered before they are allowed to join. For example, if the applicant chooses "Other" as the answer to a question, it can require that a detail field be filled in.

39 Members can join waitlists for events and automatically be notified when space opens up.

40 iMIS Forms Plus can be used for creating new accounts, complex membership applications, or contact-us forms.

41 EMS makes it easy for members to update their profiles — and members love to update their profiles

iMIS EMS offers significant productivity improvements, new capabilities, streamlined workflows, and a lovely user interface. Our team of iMIS experts can help your staff get the most out of EMS — from migration to practical tips and beyond.

If you would like to talk about your association and iMIS EMS, please contact:

Megan Shankle
Vice President, Client Relationships
ISG Solutions, LLC
301-519-3776
mshankle@isgsolutions.com

ISG
SOLUTIONS LLC

301.519.3776
WWW.ISGSOLUTIONS.COM

Beyond the smiling faces of these sketches, you'll find our expert
iMIS EMS team — ready to help you get the most out of iMIS!