
iMIS Documentation

iMIS 15 Web Guide

By Advanced Solutions International



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New to *iMIS*?

iMIS is software that runs organizations and their websites, managing the day-to-day information needs of associations, churches, and other non-profit businesses. You use it to not only store data but also maintain relationships, run events, raise funds or awareness, and communicate with the members of your group.



iMIS is an end-to-end tool that lets you and your members complete organizational tasks from the web

iMIS streamlines association management and the business aspects of managing data. It unifies how staff members conduct daily business with how visitors to your website take care of their own needs: joining, registering, donating, subscribing, learning, ordering, and participating.

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Understanding *iMIS* user classes and views

The three types of users

1. **Full users** have complete access to *iMIS* features in both views, limited only by how they are granted access and permissions.
2. **Casual users** participate lightly in *iMIS* activities, and they might not be employees of the organization at all. Volunteers, part-time staff members, and executives are examples of this type of user. They see *iMIS* in a limited way, because their "light" license restricts them to a fixed range of actions in *iMIS*. They can view and change limited information about another user.
3. **Public users** can only access member views of *iMIS*, if your organization is supporting one. From there, they can participate in many ways, such as to join up, shop, register for events, and donate to causes.

The three views of *iMIS*

1. *Administrative* views (**Desktop view**, **Administrative Console**) run from a workstation, which can be local or remote.
2. *Staff* views (**Web view**, **Staff site**) are what Full and Casual users run from a browser.
3. *Member* views (**Public view**, **Member site**) are standalone sites through which your organization engages Public users.

iMIS features by view and class

When users log on to *iMIS* through any of its views (administrative, staff, or member), exactly what each can *see* and *do* varies according to two things:

- **Licensing** - the keys registered in your *iMIS* database, which enable features and numbers of users
- **Credentials** - the user class and any roles, groups, authorization levels, and access keywords defined in each user record

Here is what Full, Casual, and Public user classes can do in each of the views of *iMIS* when you grant them the fullest access possible:

Features	Full user		Casual user		Public user
	Admin	Staff	Admin	Staff	Member
Contacts					
Find/view contact or committee	■	■	■	■	directory*
Add new contact	■	■	■	■	my company*
Edit contact profile data	■	■	■	■	myself, my company
View activities	■	■	■	■	my transactions
Add/edit call log	■	■	■	■	
Maintain user logon/password	■	■	■	■	
Add/edit committees	■		■		
Add/edit non-call activities	■		■		
Manage chapter rosters	■		■		
Run contact-related reports	■		■		
Events					
View event registrations	■	■	■	■	myself, my company
Run event-related reports	■		■		

Features	Full user		Casual user		Public user
	Admin	Staff	Admin	Staff	Member
Register contact for an event	■				myself, my company
Set up/manage events	■				
Orders					
View product orders	■	■	■	■	myself
Run orders-related reports	■		■		
Place product orders for a contact	■				myself
Set up products or warehouses	■				
Fundraising					
View giving history	■	■	■	■	myself
View gifts, pmts, adjs, rqsts	■		■		
Enter gifts via Rapid Gift Entry	■	■		■	
Run fundraising-related reports	■		■		
Process donation for a contact	■				myself
Billing					
View billing history	■	■	■	■	myself
Run billing-related reports	■		■		
Process accrual dues	■				
Pay billing for a contact	■				myself
Marketing					
Process Manager	■	■			
Financials					
Web Content Manager		■		■	
System Setup, Administration					
	■				

* Which contact records can be accessed?

- ☐ Public users find contacts and committees through the *directory*, which shows limited contact information
- ☐ Public users can access their *own* record
- ☐ Public users can also access the profile and event registrations for *others in their organization (my company)*, but only if *authorized to manage their company roster* (see "[Configuring settings for roster management](#)")
- ☐ Full and Casual users can access all contacts

Basics for Casual users

With iMIS, your organization can provide a public-facing website so your customers or members can manage their own account, register for an event, purchase products, pay membership dues or subscriptions, and submit donations.

Directory

- find users

- find committees

Events

- view a list of Events
- view Event calendar
- search for upcoming events
- register for events

Store

- purchase products
- search for products
- review shopping cart

Donate now!

- submit online donations

My Account

- view and update personal information
- pay dues and subscriptions online
- review order history
- manage ID and password

Understanding your Casual access

As a Casual user you can use both administrative and staff views of *iMIS*, as permitted by your privileges ("authorization levels").

How privileges control your view

Your privileges are controlled by the set of Authorization levels (numbered 0 to 8) assigned for you. No Casual user can have anything above a 2 in most cases. Each numbered level (such as **2**) is associated with specific privileges (such as *Reports*), and each controls whether specific windows and fields appear, as appropriate for that level.

Module Authorization Levels			
*Customers	4 - Full Entry/Edit	*AR/Cash	0 - No
*Dues	1 - Basic Display Only	*Sys Mgmt.	0 - No
*Orders	1 - Basic Display Only	*Fund Raising	1 - Bas
*Certification	2 - Reports	*Referral	2 - Rep
*Events	2 - Reports	*Exposition	2 - Rep

See your system administrator for help with your authorization levels.

Regardless of these authorizations, some tabs and navigation items are *always* hidden from you as a Casual user. If you try to access an area that is closed to you, *iMIS* displays **You do not have permission to view this content.**

What can I do?

With a Casual license and the right privileges (authority level [n]), you can:

- find and view records in most modules [1]
- run reports in most modules [2]
- **Customers** (*administrative*):
 - manage committees and chapter rosters [1]
 - create and edit contact records [3]
 - enter gifts through Rapid Gift Entry [3]
 - delete contact records, import activities, find duplicate contacts [4]

What can't I do?

With a Casual license, you can never:

- delete any *iMIS* records other than contacts
- merge duplicate records
- access financials through **AR/Cash**

What can I do in staff versus administrative views?

These are the areas across *iMIS* available for use by Casual users. See the Access Control topic for each area for complete details. The greatest possible access a Casual user can hold is authorization level **2** for all modules (except **AR/Cash**), level **3** for **Fundraising**, and level **4** for **Customer**.

Note: Assume authorization level [1] except where noted.

Casual Staff	Casual Administrative
Contacts and Committees Find contact or committee Name maintenance [3] Address maintenance [3] Call Log activity creation [3] View activities User-defined maintenance User Logon / Password maintenance [4] View Change Log	Customers Find and view contact records Create and edit contact records [3] Delete contact records [4, if enabled] Manage committees Manage chapter rosters View activity tasks Find and print duplicates [4] Run reports, including Word merge [2] Import activities (requires [4])
Events View events for any contact Register any contact with the same Company ID	Events Find and view registrations Run reports [2] Exhibition View event records Calculate years exhibited Run reports [2]

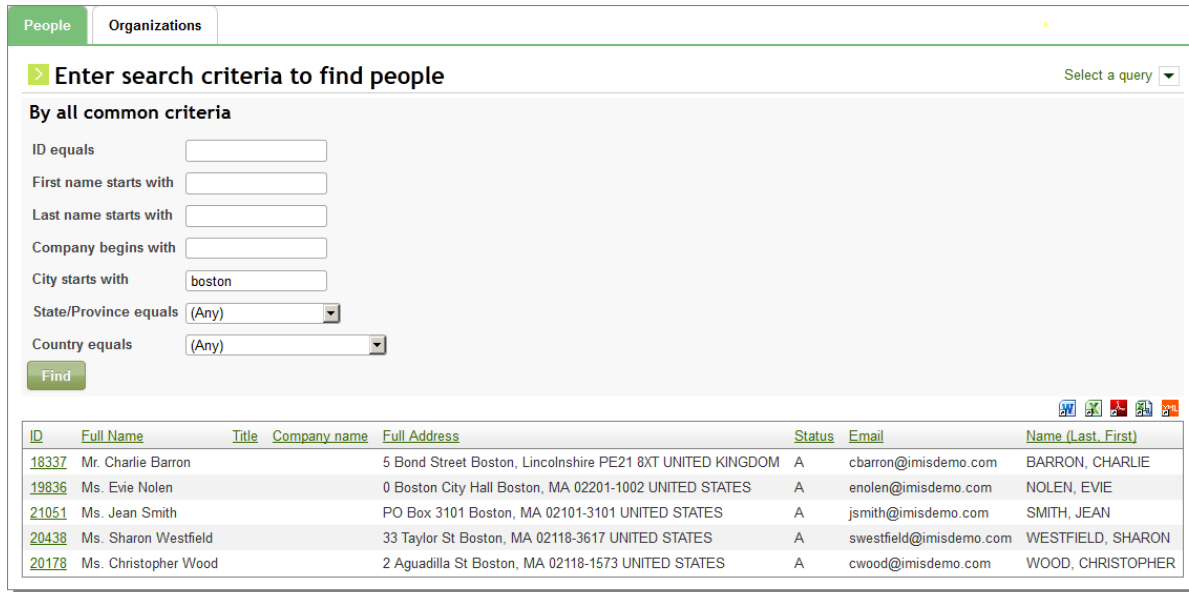
Casual Staff	Casual Administrative
Orders View orders for any contact	Orders Find and view orders Set up warehouses Run reports [2]
Fundraising View donation history for any contact Enter gifts through Rapid Gift Entry	Fundraising Find and view gifts Find and view payments Find and view adjustments Find and view requests Run reports [2] Run executive reports [2]
Billing View or pay billing for self	Billing Find and view payments Process accrual dues Run reports [2]
	AR/Cash none Certification Run reports [2] Service Central View customer requests View payments [2] View billing records View orders View fundraising records View event records Exposition View exposition records Run reports [2] Subscriptions All content Referrals View referrals Run reports [2] Leg. Tracking All content Issues View and enter issues Run reports [2] Xtender All content

Managing contacts and relationships

You have probably heard of “CRM”, which is *Customer Relationship Management*. Most likely, all the goals you have for your organization revolve around maintaining good relationships with your customers, or members, which is the heart of CRM.

In today’s world, we use databases to keep detailed records of contact information, such as name and addresses, phone and email, history and activities. CRM software such as *iMIS* promises to keep all of that under control and make sure that your effort is never wasted and that you don’t ever lose information.

We cover some basics here. The reference documentation for [Contacts](#) covers the things you can do to manage contact data with *iMIS*.



People Organizations

> Enter search criteria to find people Select a query ▼

By all common criteria

ID equals

First name starts with

Last name starts with

Company begins with

City starts with

State/Province equals

Country equals

ID	Full Name	Title	Company name	Full Address	Status	Email	Name (Last, First)
18337	Mr. Charlie Barron			5 Bond Street Boston, Lincolnshire PE21 8XT UNITED KINGDOM	A	cbarron@imisdemo.com	BARRON, CHARLIE
19836	Ms. Evie Nolen			0 Boston City Hall Boston, MA 02201-1002 UNITED STATES	A	enolen@imisdemo.com	NOLEN, EVIE
21051	Ms. Jean Smith			PO Box 3101 Boston, MA 02101-3101 UNITED STATES	A	jsmith@imisdemo.com	SMITH, JEAN
20438	Ms. Sharon Westfield			33 Taylor St Boston, MA 02118-3617 UNITED STATES	A	swestfield@imisdemo.com	WESTFIELD, SHARON
20178	Ms. Christopher Wood			2 Aguadilla St Boston, MA 02118-1573 UNITED STATES	A	cwood@imisdemo.com	WOOD, CHRISTOPHER

Contact records contain information about names stored in your database

Creating contact records

iMIS guides you through the process of creating a new account (contact), step by step.

To enter a contact

1. Log on to the *iMIS* site and select the **Contacts** tab.
2. Click **Create account** in the left menu.
3. Enter all required information (marked with an asterisk *) for the new contact.
4. Click **Next**.
5. Enter the account details on page 2 of the **Create account** process and click **Next**.
6. The account being created, finish entering the contact information, and then click **Save**.

Finding contact information

You can look up records using the **Directory** tab.

You can add a new contact, enter contact details, and view a limited set of contact data for other contacts using the **Contacts** tab. To add or change a record, you must use the **Contacts** tab.

Tip: Use the **Directory** for quick look-ups only; use the **Contacts** tab if you need to open records.

Based on your privileges, you can change or add the contact's mailing address, email address, phone, cell, or fax numbers, web site address, birth date, title, designation (such as CPA), and other information as configured.

To update contact records

1. Log on to the *iMIS* site and select the **Contacts** tab.
2. Click **Find contact** in the left menu.
3. Enter information (such as name or company) to find the record you want to update.

Tip: You are not stuck with the default search criteria. A system administrator can change the Default query (**/ContactManagement/DefaultSystem/Queries/FindContacts**) to add criteria that you frequently need.

Once you find the contact, you can change that record.

4. Use both the left menu and the tabs to access all of the areas you may need to complete or change.
5. **Save** the record.

Example: Completing a name change

Jan Gable, a member of your organization, recently got married. She calls in to request changes to her name, mailing address, and email address.

1. First, logon to *iMIS* using a web browser.
2. Click **Contacts**. **Find contact** is the default first selection.
3. Enter the first few letters of the woman's last name (*Ga*) and first name (*Ja*), and then press **Enter** or click **go**.
4. Select her record from the list by clicking the **Select** button. *iMIS* displays her contact record with the fields that you can edit.
5. Next to **Prefix**, change *Ms.* to *Mrs.* with her permission. Next to **Last name**, change it from *Gable* to *Gentry*. Change her mailing address as needed and email address as needed.
6. Click **Save**. When you see the message "Personal information has been updated" you can either click **Log Off** or go on to your next *iMIS* task.

Viewing additional contact information

Part of managing contacts is knowing what each individual has done with your organization recently and who has had contact with the person lately. The **Orders**, **Activities**, **Call logs**, and **Change logs** areas help you know how your current relationship is going with the contact so that you can act appropriately.

You can assign call activities for follow up by other members in your database. You may need to double-check the contact's recent activity to ensure you reach an appropriate correspondence interval.

As a Casual user, you can pay your outstanding dues online using the **Billing** link and view other members order history using the **Orders** link, but you'll find that you cannot view dues payment information or answer other billing-related questions for other contacts.

Your organization may be collecting additional information for each contact record, and you can find that information by clicking the **User defined fields** link.

To view recent activities

1. Log on to the *iMIS* site and go to the **Contacts** tab.
2. Enter some information about the contact you're interested in, and click **go** to search for the contact.
3. Select the person's name by clicking the arrow button in the row with their name.
4. Click **Contact Management > Activities** in the left menu.

The contact's recent purchases, attendance at conferences, and other information appears.

5. If the list of Activities is quite long, select a code from the **Filter the activity log by** list.

To create call activities

1. Log on to the *iMIS* site and go to the **Contacts** tab.
2. Click **Contact Management > Call logs** in the left menu.
3. To assign a task such as calling to follow up on a request, click **Add**.
4. Enter a note.
5. Select a username from the **Assigned to** list.
6. In the **Follow Up Date** field, enter the date you'd like for the follow-up to occur.
7. Click **Save**.

To view recent transactions

1. Log on to the *iMIS* site and go to the **Contacts** tab.
2. Enter some information about the contact you're interested in, and click **go** to search for the contact.
3. Select the person's name by clicking the arrow button in the row with their name.
4. Click **Contact Management > Orders** in the left menu.

The contact's recent orders appear, and you can print it or confirm the payment of an order.

To assign a new logon or password for a contact

Note that you must have the contact's *current* password in order to change it for them.

1. Log on to *iMIS* and go to the **Contacts** tab.
2. Enter some information about the contact you're interested in, and click **go** to search for the contact.
3. Select the person's name by clicking the arrow button in the row with their name.
4. Click **Contact Management > Logon & password** in the left menu.
 - ☐ If you want to create a new logon but leave the password the same, enter the new logon and click **Save**.
 - ☐ If you want to change the password but keep the logon the same, enter their current password, and then enter the new password twice to confirm, and then click **Save**.

Working with external contact lists

In administrative views, you can use the **Utilities** menu to import data into the *iMIS* database. You must have a license for the Import utility.

Click **Utilities > Data Transfer Utility** and then choose a sub-menu that appears only if licensed:

- **Export Utility** – opens the **Export Utility** window, where you can export data from *iMIS* to another location or third party applications such as word processor, spreadsheet program, or compatible database application. (Requires licensing for the Export Utility.)
- **Import Utility** – opens the **Import Utility** window, where you can import data into the *iMIS* database. (Requires licensing for the Import Utility.)

Managing events

From a large annual conference to a weekly committee meeting, *iMIS* is built to manage the data that helps you run events smoothly and efficiently with all the amenities that your attendees expect for their registration.

Registering attendees

These steps describe how to register people using a web browser.

You can also set up your events so that people register for themselves using the web.

For cancellations, as a Casual user you cannot cancel event registrations.

To register people for an event

1. Logon to your site.
2. Select **Events**.
iMIS assumes your contact information is the person you are registering. If you are registering another contact, click the change link in the blue bar and search for the contact name whom you want to register. Once selected, that contact's name appears in the blue bar near the top of the web page.
3. From the **Event list**, select the Event that has a Status of Active from the list.
4. Click the Register button.
If there is no Register button, notify your *iMIS* administrator that the Event is not allowing registrations.
5. Register the person for each of the event functions, filling in the required information as indicated.
6. Click **Next** to go through each registration step.
On the Functions tab, you might need to fill out individual sub-tabs to register the person for all the available functions.
7. Click **Next** on the Summary tab to review the registration and continue to the check out area.
8. Click **Next** to enter the **Payment Information**.
You can either enter a credit card number or pay with a purchase order.
9. Either enter the credit card information in the form, or click the link "**Would you like to pay with a purchase order?**" and enter the Purchase Order number in that field.
10. Click **Next**.
11. Review the **Shipping and Payment Information** and then click **Submit Order**.
An **Order Summary** page appears that you can print if necessary.

To cancel an event registration with a cancellation fee

The cancellation fee must be the only event function that has a quantity, and the **Status** must be **C**. If the cancellation fee is not the only charge, *iMIS* reverses all other charges. The registration record is retained until the event is closed, which enables you to reactivate it later during the registration process. However, the registrant does not appear on reports unless you enable the **Include Canceled** option on the **Event Selections** window.

1. From **Events**, select **Register a customer** to open the **Register a customer** window.
2. Find the event registration to cancel.
3. Click **Delete**.
A system message prompts you to verify the cancellation of the registrant.
4. Click **Yes**.
5. Click **Edit**.
A message prompt is displayed.
6. Click **Yes**.
7. Select the **Cancellation Fee** product from the **Function** list.

8. Enter a C for canceled in the **Status** field.
9. Click **Save**.

To cancel an event registration with no cancellation fee

1. From **Events**, select **Register a customer** to open the **Register a customer** window.
2. Find the event registration to cancel.
3. Click **Delete**.

A system message prompts you to verify the cancellation of the registrant.
4. Click **Yes**.

A **C**, indicating that the event registration was canceled, is displayed in the **Status** field.

Helping with events

From a large annual conference to a weekly committee meeting, *iMIS* is built to manage the data that helps you run events smoothly and efficiently with all the amenities that your attendees expect for their registration fees.

Offering registrations on the web

Your *iMIS* administrators can also set up your events so that members register for themselves using the web by enabling event registration on the web. Search for Event Setup Wizard on docs.imis.com.

Scheduling sessions

Your *iMIS* administrators can watch for conflicts in schedules by setting up **Conflict Codes** the administrative views. (Search the Helpsite for *Conflict Code*.)

Once you set up **Conflict Codes**, an optional code labels time slots or content areas to prevent scheduling conflicts. Registering for conflicting event functions then produces a warning message. Your administrator can set up conflict codes using a lookup/validation table.

Registering attendees from your company

In staff and member sites, you can register yourself or others from your company according to how the meeting is set up. These steps describe how to register people from your same company if the event is configured to do so.

Tip: Check the bar at the top of the page to see which contact *iMIS* has selected currently. To register someone else, first search for that name and then check the bar to make sure they're selected.

To register coworkers for an event

1. Select **Events**.
2. From the **Event list**, select the Event that has a **Status** of **Active** from the list.
3. Click the **Register** button.

If there is no button, tell your *iMIS* administrator that the Event is not allowing registrations.
4. Select to register yourself or someone else. If you select to register someone else, a list of coworkers will display.
5. Register the person for each of the event functions, filling in the required information as indicated.
6. Click **Next** to go through each registration step.

If there are sub-tabs on the **Functions** tab, visit them all to access all of the functions available for registration.

7. Click **Next** on the Summary tab to review the registration and continue to the check out area.
8. Click **Next** to enter the **Payment Information**.
You can either enter a credit card number or pay with a purchase order.
9. Either enter credit card information in the form, or click the link “**Would you like to pay with a purchase order?**” and enter the Purchase Order number in that field.
10. Click **Next**.
11. Review the **Shipping and Payment Information** and then click **Submit Order**.
An **Order Summary** page appears that you can print if needed.

What if the person isn't already in the database?

If the registrant has no record in the database, go to **Contacts > Create Account** to enter one. Use this opportunity to make the record as complete as you can (company, address, phone, email).

Reporting tools

Casual users can use the Reporting tools in *iMIS* for a wide range of tasks. Reports span a broad range of outputs for all of the *iMIS* modules, including rosters, status summaries, letters, badges, and statistical reports.

To run a standard report

Before running any preset *iMIS* standard reports, check your report destination.

1. From the *iMIS* module you are working in, select **Generate reports** to display the **Generate reports** window.
2. Select a report type from the **Report Types** list.
3. Select an available report from the **Available Reports** list.
4. Click **Run**. Depending on the report type, the report will run or a window will open, prompting you to select the date range for the report.
5. Enter or select the date range.
6. Click **OK**.

Resources and Hints

Documentation and Help

Current [live documentation](#) for *iMIS* is available as both online content and printer-ready downloads.

Server-based Help

With the streamlining and unifying of the *iMIS* navigation and interface to a centralized server, client-based Help also transformed to a server-based format. Help resides on our webserver, so that Help files no longer reside on individual workstations or weigh down the installation executables. *iMIS* provides Help links relative to a base URL set in the SystemConfig table, so that your administrator can change which version of the Help your *iMIS* links to.

Live updates to Help and documentation

The contents of the *iMIS* Helpsite represent the latest *iMIS* documentation, including downloadable, print-ready references; corrections and additions become available immediately.

If your organization copies down this Help site to a local server (for customization or off-line access from *iMIS*), remember that you can still access the [public Helpsite](#) from any browser.

Note: These print-ready references contain comprehensive information and appendices on each feature set; they remain available on the Help site, so you do not have to log in to **HelpNet** for documentation. Only issues and materials related to Support are posted there.

Streamlined manuals by view

The printed manual set is organized around user types and the views of *iMIS* they see. You find comprehensive procedures and field descriptions described in the downloadable set of feature-based references, but the manuals offer cross-*iMIS* views by view/role, which simplifies purchasing materials for your organization.

Tip: Always search the Helpsite for the latest, most detailed information.

Documentation conventions

The instructions in *iMIS* documentation follow these conventions:

- **Boldface:** An on-screen menu, option, window title, or other element that you should locate or select.
- **Keyname:** Which keyboard key (such as **Enter**) to press.
- **Key+Key:** Which two keyboard keys (such as **Ctrl+L**) to press at the same time (press and hold down the first while pressing the second).
- **Menu > Item:** Which menu and then which submenu item to select. Select using mouse or keyboard: **Alt, M, I**.
- Quotation marks ("") and typewriter font: Specific text to enter at the keyboard. Do not enter the quotation marks.

Note: The documentation might not match your product. Your organization can customize *iMIS*, license fewer features, or limit your security access, all of which affect the fields that you see in the product interface. Moreover, the documentation does not cover every window or window element. Windows and fields that are clearly defined in the product interface itself, or that should otherwise be intuitive, are not described in the documentation.

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Find contact

Before editing or creating a contact, you search for the contact to see if it exists in the database.

Finding records in Contacts

You can add a new contact, enter contact details, and view a limited set of contact data for other contacts. To add or change a record, you must use the **Contacts** tab.

Note: Searching under the **Directory** tab does *not* give you access to records; the **Directory** provides quick look-ups only.

The process for changing records always begins with **Find**.

To change contact records

1. Search for the contact in the **Contacts** tab.

Tip: To avoid creating a duplicate record, *always* search for the contact on the **Contacts** tab.

Once you find the contact, you can change that record.

Note: An *iMIS* system administrator can modify the query to change the results to display by default using the Default query in `/ContactManagement/DefaultSystem/Queries/FindContacts`.

2. Use both the left menu and the tabs to access all of the areas you may need to complete or change.
3. **Save** the record.

Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (**Utilities > Reports and Queries > Table Maintenance > Run UpdateFullName script**). This script can be run by a system administrator from any *iMIS* Desktop.

To search for contacts by ID

1. Log onto *iMIS* and go to **Tools**.
2. Go to Document System and open \$ > **ContactManagement > DefaultSystem > Queries > FindContacts**.
3. Edit the **default** query and put your mode into Advanced.
4. On the **Filter** tab add *iMIS* ID as a filter and make it a prompt.
5. Save the query. Now users can search on ID in **Contacts > Find contact**.

To find a contact in the Directory tab

From the **Directory** tab, you can find a contact (**Directory > Find contact**). You *cannot* change a user record by searching on the **Directory** tab.

1. Select the **Directory** tab.
2. Enter search criteria for the contact in the **Last Name starts with** field or the other fields.

Note: An *iMIS* system administrator can modify the query to change the results to display by default using the Default query in `$/ContactManagement/DefaultSystem/Queries/FindContacts`.

3. Click **Go**.

The contact list displays below the search criteria.

Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (**Utilities > Reports and Queries > Table Maintenance > Run UpdateFullName script**). This script can be run by a system administrator from any *iMIS* Desktop.

Tip: If you see fewer results than you expect, you may have a case-sensitive database; try different cases in your search (such as "Au" instead of "au").

*** Find contact**

Last Name starts with

c

First Name starts with

Company contains

State or Province equals

(Any) ▼

City equals

iMIS ID equals

Country

(Any) ▼

go

Viewing 1 thru 20 of 500 results

1 2 3 4 5 6 7 8 9 10 ...

Contact Name	Company	Location	ID
▶ Cabana, Bernard		Calgary, AB, Canada	13060
▶ Cabana, Isabelle		Calgary, AB, Canada	13108

To find committee members in Directory

1. On your site, select **Directory > Committees** for a list of all of the committees.

➔ Directory

*** Committees**

Find contact

Committees

Name

▶ Awards Committee

▶ Board of Directors

▶ Education Committee

▶ Finance Committee

▶ Governmental Affairs Committee

▶ Major Gifts Cultivation Committee

▶ Membership Committee

▶ Public Relations Committee

▶ Technology Committee

▶ Tutorial Guidance Committee

Note: Only those committees enabled to show on the web with current members will be listed. Refer to *Committee codes window* for instructions on enabling a committee for the web.

Note: An iMIS system administrator can modify the query to change the committees to display by default using the Default query in `$(Contact Management\DefaultSystem\Directory\Committees\Default`.

2. Select a committee on the list to see a complete membership list.

Directory		* Committees					
Find contact		Committee Members					
Committees							
ID	FullName	Position	TermStart	TermEnd	MailingAddress	WorkPhone	Email
107	Ms. Paula D. Caller, CPA	Member	1/1/2001 12:00:00 AM		2777 Alamo St Dallas, TX 75201-	(214) 987-8765	pcaller@acmeinc.com
110	Mr. Wayne Courtland	Member	1/1/2001 12:00:00 AM		205 W Commerce St Dallas, TX 75208-1916	(214) 445-6734	

Note: An iMIS system administrator can modify the query to change the results to display by default using the Default query in `$(Contact Management\DefaultSystem\Directory\Committees\Members\Default`.

Configuring contact creation and search options

You may want to configure some options for the user experience when creating a new account on the Public view to tailor the experience for your organization.

Need more?

- *Finding records in Contacts*
- *Creating an account*

To configure the new account experience

1. Several configuration options are available. This procedure lists some of the recent additions as well as typical configuration settings.
2. Go to **System Setup > Set up customer web components > Create account search**.
 - ☐ Select **User must select his or her company before creating an account** to allow customers to search for company records.
 - ☐ If you want to allow searches only among certain types of members, enter the codes for those member types in **Search only among members of this type**.
3. Go to **System Setup > Set up web components > Organization configuration**.
 - ☐ Enter an email address in the **E-mail address to notify when an account is updated** field.
 - ☐ Enter an email address for the **Email From (CreateAccountEmailFrom)** field to designate a particular email address to send the logon information to new accounts.
4. More configuration options are available and you can continue tailoring as you see fit.

Tips

The following information can be helpful when configuring contact creation and search options.

- It is possible for a customer to overwrite the pre-populated primary address of their selected institute.
- By default, iMIS displays only the Institute name when a customer searches for institutes.
- The customer can opt not to associate their contact information with a company. When looking up their information, a member is required to go through the process of looking for their company, but then has the option to say that their company is not listed.

Creating an account

iMIS guides you through the process of creating a new account (contact), step by step (**Contacts > Create account**). After you create an account you can edit the information by account and using the options on the **Contact management** menu (**Contacts > Contact management**).

Before creating an account, *iMIS* always prompts you to use **Find contact** to be sure the account does not already exist. If you want to require contacts to find a potential organization match before creating an account, your Administrator can select **User must select his or her company before creating an account** in the **System Setup > Set up customer web components > Create account search page**.

Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (**Utilities > Reports and Queries > Table Maintenance > Run UpdateFullName script**). This script can be run by a system administrator from Desktop.

To create an account in Contacts

iMIS guides you through the process of creating a new account (contact), step by step.

1. Log on to your site and click **Contacts > Create account**.
2. Enter all required information to look for an existing account.
3. Click **Next**.
4. Enter the account details or search for your organization name, depending on your *iMIS* configuration.

Note: Your *iMIS* Administrator can select **User must select his or her company before creating an account** in the **System Setup > Set up customer web components > Create account search page** in order to require contacts to search for their organization before creating an account.

5. Click **Next**.
6. (optional) If *iMIS* finds a pre-existing account, you can verify or add additional contact information on the next page.
7. Click **Save** to save the contact record.

Note: A contact who has had an account created for them by a staff member has to go to the Public view website and click **Look up my account**. Once they locate their account, *iMIS* sends them an email message with a link to set up their username and password.

Personal information in Contacts

On the **Personal Information** page of the **Contacts** tab, you enter and update the contact's personal information (**Contacts > Contact management > Personal information**).

* Personal		Contact: Mr. John G. Tree, Sr.	change
		Save	Reset
Update your personal info here.			
ID	109		
Member Type	Associate Member		
Prefix	Mr.		
First name	John		
Middle initial	G.		
Last name	Tree		

Address information in Contacts

On the **Address** page of the **Contacts** tab, you enter and update the address information for the contact (**Contacts > Contact management > Address**). Click **Edit** under the address information to make changes.

Update your Address Info here.	
Address	
* Address	2300 Northwest Sinclair A
Address 2	
Address 3	
* City	Dallas
* State/Province	Texas

Logon & password information in Contacts

On the **Logon & password** page of the **Contacts** tab, you modify the logon name and password for the contact (**Contacts > Contact management > Logon & password**) once you have searched for and selected the contact.

Depending on the email validation settings in **System Setup**, a new contact either receives an email with a link to this **Logon & password** page or they are immediately granted access to their account.

The screenshot shows a web interface titled '* Logon & password' with a sub-header 'Contact: Lieutena'. It contains two main sections: 'Modify Web Logon' and 'Modify Existing Password'. The 'Modify Web Logon' section has a label 'Current web logon' with the value 'BKSMITH' and a label '* New web logon' followed by an empty text input field. Below this is a 'Save' button. The 'Modify Existing Password' section has three labels: 'Current password', '* New password', and '* Confirm new password', each followed by an empty text input field. Below these fields is another 'Save' button.

Contact management

From the **Contacts** feature, you can select options under **Contact management** to view and edit a contact's information. You must find a contact before you can change information on their behalf.

Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (**Utilities > Reports and Queries > Table Maintenance > Run UpdateFullName script**). This script can be run by a system administrator from any *iMIS* Desktop.

To edit records in Contacts

1. Select the **Contacts** tab.
2. Enter search criteria for the contact in the **Last Name starts with** field or the other fields.

Note: An *iMIS* system administrator can modify query results to display by default using the Default query in `/ContactManagement/DefaultSystem/Queries/FindContacts`.

3. Click **Filter**.
4. Enter different or broader criteria if you do not see the contact in the search results.

Tip: If you see fewer results than you expect, you may have a case-sensitive database; try different cases in your search (such as "Au" instead of "au").

5. When you are satisfied with the search results, select the contact from the list.
6. Once you have selected the contact, update their information as needed, clicking the links on the left to update different types of information.
7. Click **Save** when you are done.

8. You search for and view another contact record by clicking **change** to the right of the contact name.

Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (**Utilities > Reports and Queries > Table Maintenance > Run UpdateFullName script**). This script can be run by a system administrator from any *iMIS* Desktop.

To manage company rosters

Roster management allows a designated company contact to easily access and update the records of all contacts associated with their company.

Before you begin

You must add users to the Company Administrator role so they can manage company rosters. Only users that are added to the Company Administrator role may manage company rosters.

To manage company rosters in the web-based views

1. Log on to your site with an account that has been added to the Company Administrator role.
2. Go to **My Account**.
3. Go to the **Personal** page or the **Address** page.
4. Click **Manage Roster**.
5. You can remove a member from or add a member to the roster, or select the member to change details about their contact record. When you remove a member from the roster, you must give a reason for removing.

To change reasons for removing a contact record from a roster

1. In the Desktop, go to **Customers > Set up tables > General lookup/validation**.
2. Scroll thru list of tables to find the ROSTER_REMOVAL_REASON_CODE table.
3. Add, delete, edit codes for this table as needed. Note that the codes do not need to be numbered, they can also contained shortened phrases like DEC to represent Deceased.

Values entered in this table appear in the “**Reason for removing**” drop-down list when a company administrator is deleting someone from the roster on your site.

Tips

The following information may be helpful when managing company rosters:

- By default, customers who create a user account through your public website are not associated with a company, even if they type in the name of their company when registering.
- By changing configuration settings, you can choose whether or not customers creating new accounts through your website must associate their account with an existing company or institute in the database. This is done by enabling the option **User must select his or her company before creating an account** in **System Setup > Set up customer web components > Create account search**. When this setting is enabled, a customer selects their company during the account creation process, and their record is automatically added to their company’s roster.
- An institute can choose to have one or more users to be designated company administrators.

Note: Your *iMIS* database may organize its members or customers by libraries or hospitals or another institution or affiliation using the **Institute Type** field in the **Customer Setup - Basic Options** window from **Customers > Set up module > General > Basic Options**. While this document refers to the default term “Company” your *iMIS* configuration may use another term based on **Institute Type**.

- When you delete a contact from a company roster, *iMIS* asks for a reason for deleting. There are six default selections but these can be edited or added to as described above.

Contacts Billing

You can view and pay dues for a contact using the **Billing** option in the Contacts menu (**Contacts > Contact Management > Billing**) if your contact record has the correct permissions as a user.

Note: You cannot create an invoice online. Invoices are created from Desktop.

1. Click on the Billing option.
2. After viewing the **Billing** dues, and if available, selecting optional items, you can click **Add to Cart** and continue through the payment process.

Pay your dues online

Hide Paid Dues

Dues	Paid	Amount	Select
Basic Membership Dues		75.00	<input checked="" type="checkbox"/>

Voluntary Dues	Paid	Amount	Select
PAC Contribution		<input type="text" value="0.00"/>	<input type="checkbox"/>

Dues Total:	75.00
Section Dues Total:	0.00
Voluntary Dues Total:	0.00
Dues Grand Total:	75.00

Add to Cart

Contacts Activities

You can view the activities log using the **Activities** option on the **Contacts** menu (**Contacts > Contact management > Activities**). You cannot change the activities from the **Activities** page.

*** Activities** **Contact: Lieutenant Betty K. Smith** [change](#)

View the activities log here.

Filter the activity log by: Records per page: 5

Type	Product Code	Date	Attachment (s)	Description	Note	Thru Date	Amount	Units
DUES	BASIC	11/23/1999	0	Basic Membership Dues		12/31/2000	75.00	0
DUES	PAC	11/23/1999	0	PAC Contribution		12/31/2000	20.00	0

Contacts Call logs

On the **Call logs** page of the **Contacts** tab, you can view and add a call activity for a contact.

*** Call logs** **Contact: Mr. John G. Tree, Sr.** [change](#)

[Add](#)

Records per page: 5

Date	Attachment (s)	Note	Follow Up	Assigned to	Follow Up Date	Action (s)
1/30/2007	0	Called about Spring event.				
1/30/2007	0	Call about membership drive, 2008.				

Contacts > Contact Management > Call logs

To add an activity

1. To add an activity, select the record.

2. Click **Add** to record a new call activity.

* Call logs

Add

* Note

Call James about committee notes.

Assigned to

LINDA

Save

Cancel

No results returned for this selection.

Contacts Change logs

From the **Change logs** page of the **Contacts** tab, you can view the change logs for a contact.

* Change logs

Contact: Lieutenant Betty K. Smith [change](#)

View this user's current change logs.

View All Change Logs

Records per page: 5 10 25

1	2	3	4
Date/Time	User	Log	
8/5/2005 1:37:46 PM	MANAGER	Name.FULL_ADDRESS: P.O. Box 4564 Newark, NJ 07107-2564 -> P.O. Box 4564 Newark, NJ 07107-2564	
8/5/2005 1:37:43 PM	MANAGER	Name.FULL_NAME: Hon. Betty K. Smith -> Betty K. Smith	

[Contacts](#) > [Contact management](#) > [Change logs](#)

Contacts Orders

The **Orders** option of the **Contacts** tab allows you to view *but not change* a contact's orders.

1. From the **Orders** option on the **Contacts** tab, you can view a contact's orders.
2. Choose the **View Order by** option on the drop-down list.
3. From the list of orders, click **View Details**.

4. When you view the details, you may chose to **Resend the Order Confirmation**.

View your current orders.

[Resend Order Confirmation](#) [Back to order summary](#)

Order Date:	12/15/2006
Order Total:	70.49
Payment:	Purchase Order: 12356
Order Number:	91

Contacts Fundraising

From the **Fundraising** page on the **Contacts** tab, you can view Fundraising history for a contact.

*** Fundraising** **Contact: Mr. Douglas A. Hunt, Jr.** [change](#)

View this fundraising history here.

Filter the fund raising history by:

☐ Gifts ☐ Pledges ☒ Both

Records per page: 5 10 25

1 2 3 4			
Date	Amount	Type	Source
4/13/2005	100.00	GIFT	Fundraising
4/14/2005	120.00	GIFT	Fundraising
4/19/2005	50.00	GIFT	Fundraising
4/13/2005	100.00	PLEDGE	Fundraising
4/14/2005	150.00	PLEDGE	Fundraising
Total	520.00		
1 2 3 4			

Contacts > Contact management > Fundraising

User defined fields

You can enter information to user defined fields from the **User defined fields** page if the Public view administrator has created and enabled these fields.

*** User defined fields** **Contact: Mr. James N. Bondlum** [change](#)

Spouse Name

Information has been updated.

Spouse

[Save](#) [Reset](#)

Configuring settings for roster management

You configure institute access settings when you want to designate who can modify a roster list. *iMIS* offers several configuration options for enabling roster management including search options.

Only users that are added to the **Company Administrator** role may manage company rosters on your site. When a user with the **Company Administrator** role logs on to your site, they see a **Manage Roster** button wherever the roster appears, such as **Personal** or **Address** pages.

To configure settings for roster management

1. Log in as an administrator.
2. Go to **System Setup > Set up customer web components > Roster Management Configuration**.
3. Configure the following options:
 - ☐ Select **Roster management enabled in iMIS Web Components**.
 - ☐ To allow the Company Administrator to add new accounts to their company roster from your site, select **New accounts can be created from roster management**.
 - ☐ If you want to change from the default value of 15, you can modify the value in the **Number of members to show at once** field.
4. Go to **System Setup > Set up customer web components > Personal information configuration**.
 - ☐ In the **Member Type Choices** field, enter the codes for the member types that may be selected when creating new accounts or editing accounts within the Public view.
5. Determine which designated members may be Company Administrators who can manage the roster list.
6. Assign these users to the **Company Administrator** role by going to **System Setup > Security Administration > Users** and assigning the role.

Tips

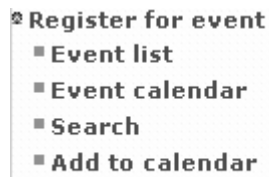
The following information can be helpful when configuring these roster management settings.

- After configuring these settings, the company administrator can click **Manage Roster** on their **Personal** and **Address** pages.
- The **Company Administrator** must belong to the company whose roster they manage.
- Get email notifications of roster changes by entering an address in the **System Setup > Set up web components > Organization configuration Email address (SendToEmailOnAccountUpdate)** field.

Register for an event

From the **Contacts** tab, you can view contacts' events and register them for events. Public and Casual users can also register other contacts from the same company.

Note: If you have opened a contact record, you can click the name of the event and proceed through the registration process to checkout.



To register for an event in Contacts

From your site, you can register for an event from the Event List, the Event Search, and the Event Calendar. As a Casual user, you can register another contact for an event if you are from the same company. As a Full user, you can register any other contact.

Note: The steps to register for an event vary depending on how the event is set up.

1. Select the event.
2. Click **Register**.
3. Choose to register for **Myself** or **Someone Else**.
4. Click **Next**.
If registering for someone else, find and select the registrant from the list and click **Next**.
5. Enter any missing contact information.
You must provide a valid email address.
6. Click **Next**.
7. Select the event functions the registrant will attend.
You can click the function group headings to expand and collapse the group sections.
 1. Choose a function by selecting the **Attend** checkbox.
Functions set up for automatic enrollment do not have an **Attend** checkbox.
 2. Select the number of attendees for each function.
 3. Answer any required questions associated with the selected functions.
 4. Click **Next**.
8. Choose whether to add a guest to the registration or not.
 - ☐ If a guest is accompanying the registrant, enter the guest information and click **Add Guest**. Repeat if necessary.
9. Click **Next**.
10. Answer additional questions your event planner has added to the event setup and click **Next**.
11. View and make adjustments to the registration and click **Next**.
12. From the Cart, click **Next**.
iMIS guides you through the payment process.


Note: When you have submitted the order, *iMIS* sends an email confirmation. This online confirmation serves only as an acknowledgement of registration from the web. It does not update the registration record for a confirmation. The message, "This registration has been confirmed," does not appear in the **Register a customer** window.


Event list


List active events using filter criteria (**Events > Event list**).

In the Status column, events can be indicated as Pending or Active for Full or Casual users with an Authorization level 4 or higher. Public users do not see a Status column.

Note: This page can be configured to list any type of event using the ViewAll query. Access this query from the Document system (**EventManager > DefaultSystem > Queries > EventList**), to add a filter for the event Type.





Event Date Between 

and 

Event City Equals 

Viewing 1 thru 10 of 22 results

1 2 3

<u>Date</u>	<u>Title</u>	<u>City</u>	<u>State or Province</u>	<u>Status</u>
 9/12/2007	Professional Development Seminar	London		Pending
 9/19/2007	Professional Development Seminar	Singapore		Pending
 9/26/2007	Professional Development Seminar	New York City	NY	Pending
 10/1/2007	President's Gala	Seattle	WA	Active

Events > Event list

Event calendar

View the calendar, specifying the month and year (**Events > Register for an Event > Event calendar**).

* Event calendar

Jump to:

< January 2007

Sun	Mon	Tue	Wed	Thu
31	1	2	3	
7	8	9	10	

Event search

Find events, searching by a date range, event name, city, state or province (**Events > Search**). In the Status column, events can be indicated as Pending or Active for Full or Casual users with an Authorization level 4 or higher. Public users can not see a Status column.

Tip: When searching for multiple locations for City and State, put each value in quotations and use commas between multiple values. For example, enter "Austin", "Dallas", "Houston" to search for Events in those three cities.

* Search

Cont

Event Date Between

and

Event Name Contains

Event City

State or Province

go

Viewing 1 thru 10 of 17 results

1

2

Date	Title	City	State or Province	Status
12/12/2007	Career Development Seminar	London		Pending
12/19/2007	Career Development Seminar	Singapore		Pending
12/26/2007	Career Development Seminar	New York City	NY	Pending
1/1/2008	New Years Eve Bash	San Ramon	CA	Active

Events > Search

Note: This page can be configured to list any type of event using the ViewAll query. Access this query from the Document system (**EventManager > DefaultSystem > Queries > EventSearch**), to add a filter on event Type.

Add to calendar

Add an event to the contact's Outlook calendar (**Events > Register for an Event > Add to calendar**).

* Add to calendar Contact: Mr. John J.

Select the event(s) to add to your Outlook calendar:

☒ Annual Conference

☒ Leadership Conference

☒ Spring Meeting

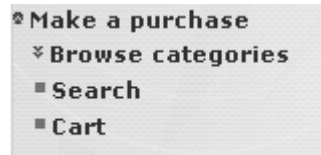
☒ Expert Witness Conf

MS Exchange e-mail address

Make a purchase

On the **Make a purchase** page, you can browse and search for specific products and view the **Cart** of the contact (**Contacts > Make a purchase**).

Note: If you have opened a contact record, you can click the name of the product and proceed through the purchasing process to checkout.



Searching for a product

From the **Search page**, you can search for a product in the *iMIS* system (**Contacts > Make a purchase > Search**).

A screenshot of the iMIS search results page. On the left is a sidebar with 'Browse Categories', 'Category Featured', 'Search' (highlighted), and 'Cart'. The main area has a search form with 'Search Term: large shirt', 'Match On: Any Words', and 'Results per Page: 20'. Below the form, it says 'Your search for large shirt returned 3 results.' and 'Page 1 of 1' with 'Previous' and 'Next' buttons. A table follows with columns 'Name' and 'Description'. The table contains three rows: 'iMIS 15 Polo Shirts', 'iMIS 15 Blouse', and 'Is Fast Food Franchising for YOU?'. The last row is truncated. At the bottom, it says 'Page 1 of 1' with 'Previous' and 'Next' buttons.

Name	Description
iMIS 15 Polo Shirts	Short sleeve, single pocket polo shirt with the iMIS 15 logo
iMIS 15 Blouse	Guaranteed to look stunning and fit on any build. The iMIS 15 logo is displayed on the right.
Is Fast Food Franchising for YOU?	Fast food franchising is \$125 billion a year industry, accounting for a large portion of restaurant sales in the U.S., so understanding their popularity and proliferation is easy. Buying a fast food franchise, while potentially lucrative, requires a lot of hard work. This video will assist you with

Tips

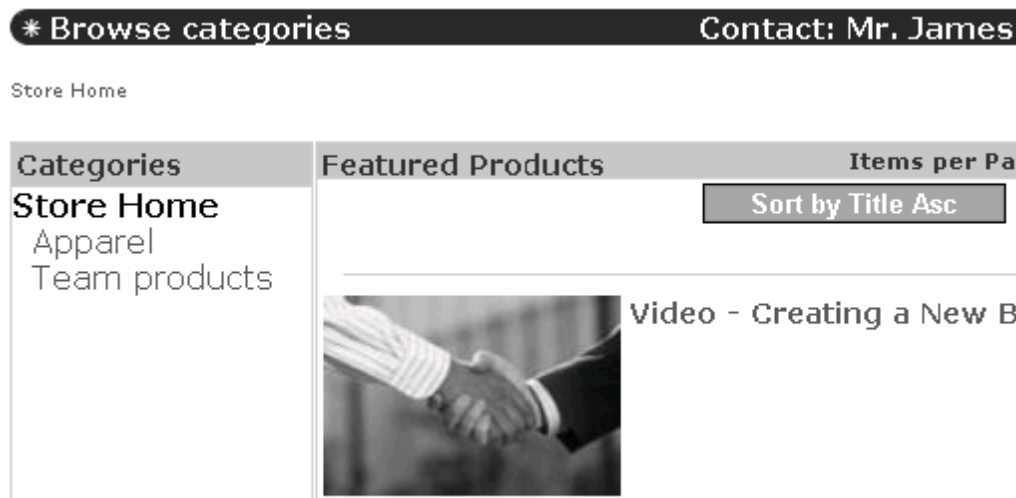
- Capitalization does not affect search results.
- Products are searched by name, the first 300 characters of the description, and attributes, such as color or size.

No search results?

- Search terms must be three or more characters long.
- In rare cases, your search term may fall after the 300 character limit of the product description, keeping the product from being found. Add more terms to broaden your search.

Browsing product categories

In the **Browse categories** page, you can browse the available products by the categories that are set up by your administrator (**Make a purchase > Browse categories > Categories featured**).



To use the Cart

From the **Store** tab, you can view, add, and remove products. This process is available to Public, Casual, and Full users.

1. **Search** or **Browse Categories** for the product.
2. Select the product in the product listing.
3. From the **Product Details** page, **Add To Cart**.



4. When you are finished selecting products, **Checkout**.
5. *iMIS* will guide you through the rest of the purchasing process.
 1. On the **Cart Items** page, edit or delete products from the cart.
 2. On the **Shipping** page, provide a **Shipping Address** and **Shipping Method**.

You may enter an **Alternate Shipping Address**.

Note: The Shipping Methods shown in the shopping Cart are based on the Zone table defined for the Ship To Country. If the Ship To Country field is blank, the Country Default Ship Method or the System Default Ship Method will be used.

3. On the **Payment Information** page, enter your payment details.

The **Postal Code** on the **Payment Information** page can be left blank. However, you are required to enter either **State** or **Country**.

- If **State** is populated, **Postal Code** is required.
- If **Country** is United States or Canada, then **State** and **Postal Code** are required.

Note: Required fields are indicated by the red asterisk. The **State** and **Country** fields do not have the red asterisk indicating that they are required fields.

4. Review the order on the **Shipping and Payment Information** page.
5. **Submit Order**.

Cart Items		
Products		
Product	Quantity	Price
"A Whole New World" Mousepad	1	6.95
"I LOVE iMIS" Button	1	2.95
		Total 9.90
		Shipping 5.40
		Handling 2.00
		Tax 0.79
		Grand Total 18.09
Previous		Submit Order

Communities

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Communities Essentials

Start here to learn what you can do in **Communities** as a member, a subscriber, a moderator, or a wiki author. Moderators and wiki authors are members who hold extra permissions to help do the work of developing and managing the content in a community.

Quick facts: Communities

With **Communities**, your organization can host multiple communities, each offering its own discussion forums, document libraries, coauthored wikis, and personal blogs.

Communities

[Communities > Community List](#)

Communities

[Community List](#)

[Preferences](#)

[Communities help](#)

Name	Description
STW Atlanta - Members	STW Atlanta Chapter - City of Peace
STW Austin - Members	STW Austin Chapter - Keeping it weird
STW Chicago Chapter	STW Chicago Chapter
STW Colorado Springs Chapter	STW Colorado Springs Chapter

Create as many standalone communities as needed to support groups within your organization.

This integrated set of community features offers a robust set of collaboration and communication tools that match and extend your online presence. **Communities** uses your existing *iMIS* contact records and leverages *iMIS* security and website management tools.

Forums

General
posted June 1, 2009 by Sarah Harris
In the "Why didn't we think of this before?" department: Check this space for news and announcements about the forum itself.
[3 topics](#) [subscribe](#)

SIG Contractors
posted June 1, 2009 by Inigo Montoya
Special Interest Group for contractors and independent consultants
[2 topics](#) [subscribe](#)

Blogs

From the Presidents desk...
posted June 1, 2009 by STW Administrator
[Add a Blog](#)

Wikis

Resources
posted June 1, 2009 by Brendan Stillion
Share information and links about all areas of STW knowledge and concern. This wiki is community maintained, just like Wikipedia. Please correct any errors that you see, expect others to correct and extend your contributions, and understand that your content may change/move as the wiki matures.
[5 articles](#) [subscribe](#) [report](#) [edit](#)

Announcements

Tonight's Election Postponed
posted June 1, 2009 by STW Administrator
Due to problems securing the roster of candidates and outstanding questions about requirements for service Board has voted to postpone the elections one month.
[0 replies](#) [subscribe](#)

Chapter Merger Approved
posted June 1, 2009 by STW Administrator
Good news! Our regional sponsor has approved our application to let the San Marcos chapter merge with ours into a new chapter.

Resource Library

ResourceLibrary

Photos

Presentations

Resumes (PDF)

Community Roster

1 2

Page 1 of 2, items 1

	First Name	Last Name	Company	Position
select	Randi	Amor	Creative Distractions	Account Executive
select	Fernando	Amor	Creative Distractions	Account Executive
select	Wilson	Anderson	Creative Distractions	Account Executive

Each community has its own set of announcements, forums, blogs, wikis, resources, and members (roster).

Communities features

■ Forums

- ☐ unlimited number of forums per community
- ☐ replies that are threaded with the rest of the topic discussion
- ☐ posts that can be reported as inappropriate
- ☐ subscribe for email notifications for entire forums or specific topics

■ Blogs

- ☐ individuals or groups can start a blog
- ☐ linked, dated archive to previous blog entries
- ☐ subscribe for email notifications for one or all blogs

■ Wikis

- ☐ supports collaborative authoring of wiki articles
- ☐ articles can have multiple authors, with online identity provided by *iMIS*
- ☐ subscribe for email notifications for any new or changed articles

■ Community management

- ☐ each community has its own security settings
- ☐ same look and feel as the rest of your *iMIS* website
- ☐ subscribe to Recent Activity for updates on any and all content changes
- ☐ many choices in subscription granularity: community-level, all forums/wikis/blogs, individual forums/wikis/blogs, individual posts within forums/wikis/blogs
- ☐ customizable email notifications

■ Resource Libraries

- ☐ add documents, videos, audio files, and image files
- ☐ maximum file size is adjustable
- ☐ folders aid organization and security control
- ☐ define security permissions for the resource library the same as for the community

What are communities?

An online community lets a group collaborate on projects, share knowledge, communicate and connect with others, and stay in touch using email subscriptions. Communities have configurable layout pages that help you manage the shared content and also manage the group that defines the community.

Community management with *iMIS* offers some distinctly defined tools for collaboration and group work on the website. Use the tool that's right for how you want to disseminate the information. For example, put time-sensitive topics in a blog or forum, but put knowledge base articles in a resource library or wiki.

Announcements

These posts display in the Announcements area of the Community page and accept no replies. They allow community administrators to broadcast messages to all community subscribers and members.

Forums

Forums let community members post and reply to discussions. Often forums are organized for specific discussion topics, and community members post in a forum based on the topic they want to discuss with others. Forums contain *topics*, and subsequent entries on a topic are called *posts*. When a community member subscribes to a forum, they receive an email every time that a post is added or when someone replies to a topic with a post.

Blogs

Blogs list *entries* chronologically, typically from newest to oldest, often created by one person. Group blogs contain entries from multiple authors. Entries might offer commentary, news, event announcements, or material such as images or photos or links to other blogs. Blogs can be personal or professional, in a non-profit context, it is likely to be used for communication, connections, community growth or enhancement, marketing, customer support, or public relations purposes. Blogs allow other readers to write comments for individual entries, and readers can subscribe to a blog to receive every blog entry as an email. Community administrators can edit any blog entry.

Wikis

Wikis are grouped collaborative web pages that enable quick editing of the pages by allowing community members to add or edit articles to the community website. Wikis allow anyone to add and edit articles, but you cannot view revision history or the original author or subsequent edits of an article, so these are similar to a wiki. Wikis contain articles. You cannot comment on a wiki article, but you can edit one, if permissions allow. Subscribing to a wiki means that every time an article is added or edited, you receive an email message indicating what has changed.

Resource Library

Libraries store shared files, which are content such as Word or PDF files, forms, or graphics that you want to make available to everyone in the community to download.

Recent Activity

The Recent Activity area offers a view of every content item that has been added or updated in reverse chronological order. It is available in some of the community portal layouts, and subscribing to the Recent Activity is an easy way to ensure you receive an email notification for every content addition or update across the community.

Subscribers

Community administrators can add members based on any number of criteria, such as location or membership type. The subscriber list comprises the roster for the community.

Using a community

Here are the basics you need to start using Communities:

- **Opting Out:** When someone *subscribes* you to a community, you are signed up to get email notifications when community announcements are posted. You can *opt out* of these emails by clicking the **Unsubscribe** links for the community, the announcements, or any specific area of the community from which you don't want updates.
- **Opting In:** When new content is created, you can *opt in* to get those updates. You can subscribe to any forums, forum topics, wikis, blogs, and blog entries that interest you. Pick the granularity that suits you: you can choose to get updates from an entire forum *or* just from a single, relevant topic. Subscribing means that you will follow all comments that follow from the original post.

To set your preferences

You can use communities without subscribing, but it can be hard to keep up without notifications about what's changing. Spending time setting your subscription and email preferences is key to achieving the flow of update notifications that works best for you.

1. Click **Communities**. The **Community List** shows you all of the communities that you are allowed to use.
2. Select **Preferences** to see what you are subscribed to across all communities.

Tip: If the subscription list is too long for you to easily find items, click the header labels to sort the columns (each click toggles between ascending/descending order).

3. Use the **unsubscribe** link to leave any communities or content areas (forums, blogs, etc.) that you do not want to follow.

Tip: Even if you hate email, stay subscribed at the *community* level so that you get critical announcements from the administrators.

To subscribe to a new community

1. Click **Communities** and select the **Name** link of the community you want to follow.
2. Use the **Subscribe** link at left to start receiving announcements for that community.
3. Browse through the content areas (blogs, forums, wikis) and use the **subscribe** link below each content area to follow updates to those areas that interest you.

To create a post

A post can be a reply, comment, blog entry, forum topic, or wiki page, as your permissions allow.

1. If you are allowed to create content in the area, you will see an **Add...** link.
2. Click **Add..** and enter a title or subject and text for the body of the post.
3. If available and needed, click **attachments** to add a file (which is stored in the Document System).
4. Click **Save**.

To report inappropriate content

Community administrators can fix and even remove objectionable content throughout the community, but only if members alert them to the situation. Whenever you see problems with content in the community, use the **report** feature to help your administrators deal promptly with the problem.

1. While viewing the post or comment, click the **report** link.

The **Report Inappropriate Content** window appears.

2. Enter an **Explanation** with reasons for reporting the post or comment.
3. Click **Send**.
4. Once you see the message that your report has been sent, click **Close**.

All of your community administrators receive the email about the inappropriate content, which improves how quickly the team can respond to the problem.

To view community subscribers

The *roster* is the list of all subscribers to the community itself. The **Position** column lists the security role of each member. Most will be **Subscriber**; a few will be **Administrator**, **Moderator**, or **Wiki Author**.

1. Click **Communities** and open a community from the **Community List**.
2. Scroll down to the **Community Roster** section, on the lower right, to see the compact version.
3. Click the **Roster** link in the left navigation to view the expanded list of community members.

Tip: Click a column heading to sort by that column.

Community Roster

Add



Change page: < 1 2 3 4 5 6 7 8 > | Displaying page 1 of 8, items 1 to 20 of 150.

Change page: Go Page size: Change

	First Name	Last Name	Company	Since	Position	Last Post	Last Post Date
select	Robin	Allen		4/7/2009	Subscriber		
select	Terry	Anderson	Acme, Inc.	4/7/2009	Subscriber		
select	Dawn	Anderson	Bachman Floral	4/7/2009	Subscriber		
select	Albert	Bachman	Bachman Floral	4/7/2009	Subscriber		
select	Nancy	Baker	Acme, Inc.	4/7/2009	Subscriber		
select	Ruth	Baker		4/7/2009	Subscriber		

Creating your blog

Create a blog to publish periodic entries on a particular topic. Your blog entries appear chronologically, with your newest entries topping the list. Blogs serve as collections over time, and the topics can be as serious as reports or as casual as personal online journals. Blogs accept comments, so that readers can respond to the entry and to each other.

To define a blog

1. Log on and open the community where your blog will reside.
2. Select **Blogs** from the navigation links.
3. Click **Add a blog**.
4. Define the blog.

Tip: Even if you don't enable **Allow HTML in posts** in the blog, URLs in blog entries still convert to links.

5. Click **OK**.

Moderating a forum

Serving as a moderator helps to distribute the load of monitoring the activity of your community's forums and wikis. Moderators have privileges beyond those of regular community subscribers, including the ability to see who is subscribed to a specific forum.

To verify your moderator status

1. Log into the site, select **Communities**, and open your community.
2. On the community **Home** page, locate the **Community Roster** and look for your name.
3. If you do not appear as a **Moderator** or **Administrator**, have an administrator change your community role (under **Security**) so that you can proceed.

To view forum subscribers

Moderators can see which members are subscribing to a given forum. Seeing this list of participants allows moderators to evaluate the constituency (are these our experienced members or our newer ones? are any experts subscribed and contributing to the discussion?) and the success of the forum (should I take action to get other members subscribed?). Monitoring forum subscriptions helps you understand which topics are of most interest to members and where changes might be needed.

1. Open the forum you're interested in by clicking on its title.
2. Locate the **Subscribers** box under the **Recent Posts** (usually at right).
3. Seeing the subscribers to a forum in real time gives you valuable management information, but you can do more with those subscriber lists. Use the export commands (Word, Excel, Acrobat PDF, CSV data) as needed to capture the subscriber information for other uses:
 - Snapshot the subscriber information over time, for activity analysis by community administrators
 - Timestamp the export files, for easy management and future reference
 - Share your archives of subscriber data, to help you hand off duties to the new volunteer forum moderator
 - Export the subscriber data for quick mail merges, badge printing, or other service tasks by Public users

To approve forum postings

Being a moderator for a moderated forum goes beyond deleting inappropriate content that gets posted: you are a gatekeeper that approves (or rejects) forum posts before they ever show up on the forum.

1. Study the content standards and the action policies of your community, which should specify what content should not be allowed to post and what to do about it.

Tip: Policies are *critical*; fights over moderation can poison discussion forums. If these policies aren't published on the community for the members to follow, insist that your community administrators do so, to avoid future conflicts.

2. Subscribe to every forum so that you get email notifications about new content publications.
3. When you get an email that a posting was published, click through the link in the email, log on, and view the forum.
4. Since new postings can trigger quick responses, scan for new replies in the forums.

Versioning
posted September 29, 2009 by Jason Tillman

How do you distinguish between successive versions of an Industry Standards document? When do Updates to the document require a new version (versus a low overhead change-log)

last reply on September 29, 2009 by Alicia Gould

2 replies **(2 awaiting approval)** [subscribe](#) [report](#) [edit](#) [delete](#) [attachments](#)

5. When you find a posting needing approval, open it and scan the body of the posting for inappropriate content (according to your community's policies).
6. Select either **approve** or **decline** as appropriate.
7. While you're logged in, open any additional forums you moderate.

Tip: Select **Home** at left, and scan the summary view of the forums for topics that are ...**awaiting approval**, and tend to those.

Creating a wiki

Add a wiki (which means "quick quick") to create a group authoring area on the website, for a shared writing project or knowledge base. Wikis are web pages that are grouped by subject, such as *Policies and Procedures*. They enable quick, collaborative development by allowing more than one author to add and edit articles. Subscriptions allow members to keep up with changes to a single wiki page or the entire wiki.

Moderating wikis without restricted authoring

Keeping wiki authorship open to all members is best in terms of maximizing the contributions and inclusion of others. If your organization has concerns about incorrect or inappropriate information making it into a wiki, see if moderation by administrators cannot give you the protection you need, as they have the power to correct and delete such content.

To work in this way, be sure that administrators are subscribed to the specific wikis in question, so that they will be notified of all page submissions and can respond promptly.

To create a wiki

1. Open the community where you want to create a wiki by clicking the community name in the community list.
2. Click **Add a wiki**.
If you do not see this link, you may need to be made a Wiki Author by your community administrator.
3. Define the wiki.
If you enable **Restrict authoring to Wiki Authors** but are not yourself a Wiki Author, you won't be able to edit the wiki.
4. Click **OK**.
5. Click **Subscribe** if you want to receive email notifications of all changes to the wiki.

Edit Wiki window

This window defines a collaborative work space similar to a wiki where community members can create and share articles with the community.

Edit Wiki

*Name Policies and Procedures

Body

Post all approved policies and procedures of the chapter and the board.

- Authorship is restricted to current and immediate past board members.
- Any questions unspecified herein defer to STW International bylaws and policies.

Design HTML Preview

Graphic select image

Graphic Alt Text

☒ Allow HTML in posts

☒ Allow attachments to posts

☒ Restrict authoring to Wiki Authors

Save Cancel

Select community link > Add a wiki

- **Name** - Specifies the name of the wiki.
- **Body** - Specifies a description for the wiki which is listed on the Community home page. If you find some features of the HTML editor confusing, you can [download user documentation for the editor](#).

Note: Some features described in this external document have not been enabled for use when defining communities.

Caution! If you use the HTML editor's built-in **Image Editor** to modify an image that has a transparent background, the transparent background will be replaced by solid black pixels. If you need to edit images that have a transparent background, you should save a copy of the image to your local computer and use your preferred image editing program to modify it. Then upload the new version to *iMIS* again, overwriting the old version if desired. The easiest way to save a copy of the image to your local computer is to right-click the image shown the **Preview** area of the **Image Editor**, and choose **Save Picture As**.

- **Graphic** - Specifies the graphic that displays in the upper left hand corner when the wiki is displayed.

- **Graphic Alt Text** - Specifies the alternative text that appears when the chosen graphic cannot be displayed or when you hover your mouse over the graphic.
- **Allow HTML in posts** - Select this checkbox to enable the HTML editor so that wiki articles can have HTML in each. If this checkbox is cleared, you enter plain text when creating articles. When you enter a URL, *iMIS* automatically creates a link within the wiki article, even if this selection is cleared.
- **Allow attachments to posts** - Select this checkbox to enable a poster to attach files separately to a wiki article, such as a PDF document or an image.

Communities Administration

Community Administrators comprise a team that takes care of developing and maintaining a given community. They share the work of

- creating communities
- broadcasting announcements
- managing files in the resource library
- adding and managing members
- assigning moderators and wiki authors
- defining forums
- deleting forums, blogs, and wikis

Creating a community

To enable a group in your organization to collaborate, create a community for them consisting of a web page with preselected layouts, which include and position such things as forums and blogs.

When you finish defining and populating the main structures of the community (such as its forums and wikis), you are ready to change the security settings to allow members to see and use the community you created.

To start a community

1. Choose **Communities > Community List**.
2. Click **Add a community**.
3. Define the community using the fields described below.
4. Create forums that the members will need.
5. Open the **Security** link at left and set the **Access Settings** for the community.
6. On the other **Security** tabs, add members to the various community roles.
7. Open the **Roster** link and bulk-add members to the community, which subscribes them to receive community announcements.

Edit Community window

This window defines a community and the graphic that represents the community.

Edit Community

* Name

* Community Layout [select](#)

* Default Website (for notifications) [select](#)

Graphic [select image](#)

Graphic Alt Text

* Short Description

Long Description

[Design](#) [HTML](#) [Preview](#)

☐ Allow any member to create a wiki

☐ Community forums are moderated

[Save](#) [Cancel](#)

Communities > *Community List* > Add a community or click the Edit link while viewing the community page

- **Name** - Specifies the name of the community which is displayed on the web and in email messages sent to subscribers.
- **Community Layout** - Specifies the content record for the community which uses a selected layout.
- **Default Website** - Specifies the website as defined in **Content Management > Site designer > Manage websites**. The website must be published (not in a **Working status**). This setting indicates the website users will see when clicking a link included in a subscription notification or in a "report this post" message, so it should be a website that is accessible to all subscribers of the community. Also, do not select the **iMIS Desktop View** as the default website.
- **Graphic** - Specifies the image file displayed when readers view the Community on the web.
- **Graphic Alt Text** - Specifies the alternative text that appears when the image cannot be displayed or when you hover your mouse over the graphic.
- **Short Description** - Specifies a short description of the community and its purpose in one or two sentences. No HTML coding or CSS styling is enabled in the short description.

- **Long Description** - Specifies a longer description of the community and allows HTML coding or CSS styling. This description appears in the side bar on the Community main page. If you find some features of the HTML editor confusing, you can [download user documentation for the editor](#).

Note: Some features described in this external document have not been enabled for use when defining communities.

Caution! If you use the HTML editor's built-in **Image Editor** to modify an image that has a transparent background, the transparent background will be replaced by solid black pixels. If you need to edit images that have a transparent background, you should save a copy of the image to your local computer and use your preferred image editing program to modify it. Then upload the new version to *iMIS* again, overwriting the old version if desired. The easiest way to save a copy of the image to your local computer is to right-click the image shown in the **Preview** area of the **Image Editor**, and choose **Save Picture As**.

- **Allow any member to create a wiki** - (disabled by default) Permits all authenticated users to create wikis, regardless of their community role.
- **Community forums are moderated** - (disabled by default) Forces every forum on the community to be subject to moderation, which means that posts cannot publish until a moderator or administrator approves them.

Enabling forum moderation

Forum moderation — that is, keeping a forum posting in queue until a moderator approves (or rejects) it for publication — is sought by organizations that feel urgency to prevent erroneous, inappropriate, or damaging content from being distributed under their name, so much so that removing such postings and posters after the fact is not good enough. Such organizations are often

- new to social media and reluctant to host forums at all
- in health care, for which misinformation incurs liability
- involved in industry arbitration, where disgruntled individuals seek to hijack channels for their own ends

Best practices: Controlling forum postings

Whenever possible, decide against controlling forum postings on the front end. Enabling this approval workflow creates extra work for forum moderators, and forum members experience frustrating delays in seeing their postings broadcast and in getting input or help they may be seeking.

Are you without any control, then? Not at all.

- Be sure to post forum use policies that make clear your rules for content and behavior as well as the consequences for violation (such as two warnings and then permanent removal from the community).
- Direct your moderators to post warnings, delete inappropriate postings, and have offenders removed from the community, according to your policies. This goes far to covering your accountability.

To enable forum moderation

If your organization cannot allow *any* inappropriate forum postings ever getting through to members and subscribers, even temporarily, you can enable moderation on your forums. This moderation prevents postings from appearing until a forum moderator approves it.

Note: Forum moderation is community-wide: either all forums are moderated, or none are.

1. Log on as an administrator.
2. From the **Community List**, click **edit** for the community whose forums need moderation.
3. Scroll to the bottom and enable **Community forums are moderated**.
4. Select **Save**.
5. Open the community and go to **Security**.

6. Open the **Community Moderators** tab and add members to the moderation role, to help manage the additional work of forum post pre-screening.

Creating announcements

Use *announcements* when you have news to broadcast to the entire community of members. Think of announcements as forum topics that are read-only, with no replies allowed. These new items display in the **Announcements** area of the Community portal and are delivered as emails to all community subscribers.

To create an announcement

1. Log on as a Community Administrator.
2. Open the community where you want to define an announcement by clicking the community name in the **Community List**.
3. Click **Add an announcement**.
4. Define the announcement.
5. Click **OK**.

Managing resource libraries

To upload resource library files (Administrator)

1. Log on as a user with Administrator privileges.
2. Click the community name in the Community list.
3. Under Resource Library, click **New** and then select the type of file you want to upload.
4. In the **Document Loader** window, click **Browse**.
5. Select the file and click **Open**.
6. Click **Upload**.

Tips

The following information can be helpful when managing document libraries.

- You create resource libraries or document attachment collections when you want to gather resources into one location for the community to have access to. Anyone can download files from the Resource Library but only administrators can use the **Organize**, **New**, **Edit**, and **Versions** menus.
- You can upload the configured file types to a document library as described in [Managing attachments and uploads](#).
- A document library may contain policies, meeting minutes, or any document that does not fit a forum, blog, or wiki content model.
- You can view the Description by selecting the file and then clicking **Organize > Properties**.

Troubleshooting

If people have trouble uploading files, check both the file type and the maximum file size. If you need to adjust the maximum file size limit, refer to [Managing attachments and uploads](#) for more information.

Defining community membership and subscriptions

While all contacts (Full, Casual, and Public users) are members of your community (unless it was restricted), they do not receive content updates until they are *subscribers*. To get your community moving quickly, you can bulk-subscribe members to receive community content by selecting their *iMIS* contact records and adding them to the community Roster.

To grant member-level access to a Community

1. Logon to the as a user who is a member of at least one Master Admin Content Authority Group or a member of the SysAdmin security role.
2. Click the link to the community.
The community page displays.
3. Click the **Security** link in the left-hand navigation area.
The **Community Security** window displays.
4. Click **Show** next to **Access Settings**.
5. Under **Make this available to**, select a **Query** from the drop-down list.
6. Click **Filter**.
7. Click **Add** to add the member to the community.

To grant administrator-level access to a Community

1. Log on as a user who is a member of at least one Master Admin Content Authority Group or a member of the SysAdmin security role.
2. Click the link to the community.
The community page displays.
3. Click the **Security** link in the left-hand navigation area.
The **Community Security window** displays.
4. Under **Community Administrators > Select New Group Members**, select a **Query** from the drop-down list.
5. Enter any necessary additional information, and then click **Filter**.
6. Click **Add** to add a person as a community administrator.

To add Administrators to a community (Administrator)

1. Make a list of which members should have administrator privileges (to create, edit, and delete content).
2. Go to **Communities > Community** list.
3. Add or edit a community.
4. Select the **Community Administrators** section.
5. Choose a query from the Select a Query drop-down list, enter any limiters, and then click **Filter**.
6. Click **Add** to add the person to the group.

The person is added to the Community Administrators list under Current Group Members.

To add subscribers to a community through the Roster (Administrator)

Contact records are *members* of unsecured communities even if they have subscribed to only one forum or to nothing at all in the community. However, when you add a contact to the Roster, you automatically make them *subscribers* to all updates from the community.

1. On the Community page, click the Roster link in the left-hand navigation area.

The Community Roster appears.

2. Click **Add**.

A Finder/Lister window appears.

3. Select a query from the drop-down list and enter the filtering information.
4. Click **Filter**.
5. Select a name from the list or click the checkbox in the far left column to select all names in the page.
6. Click **OK** to add the selected members to the Community Roster.

All added members are subscribed to the community for notifications and the roster displays all the new additions in the roster list.

Tips for adding multiple contacts

- You gain multi-selection capability when you click the Roster left-hand navigation item. When subscribing people, you select one record at a time.
- You may want to modify the search query used to generate the list of results when adding contacts, so that you can select all members of a committee, or all constituents in a State or Province, for example.
- What users see may be modified by their privileges in the **Access Settings** for the Community. Refer to Shared security sets, for object-level access for information about preconfigured security sets. For example, you can choose one of the Authenticated Users security sets to require people to logon to the website before using a community.
- There are three types of community membership: member, subscriber, and administrator. A member has access to the community but may or may not be subscribed to any notifications. A subscriber receives notifications and appears on the Community Roster. An administrator has access to the community, gets notifications when someone reports a post or comment, and can delete posts or comments.

Creating a forum

You create forums to enable discussion on topics related to the community's interests. Only community administrators and SysAdmins can add forums.

To create a forum

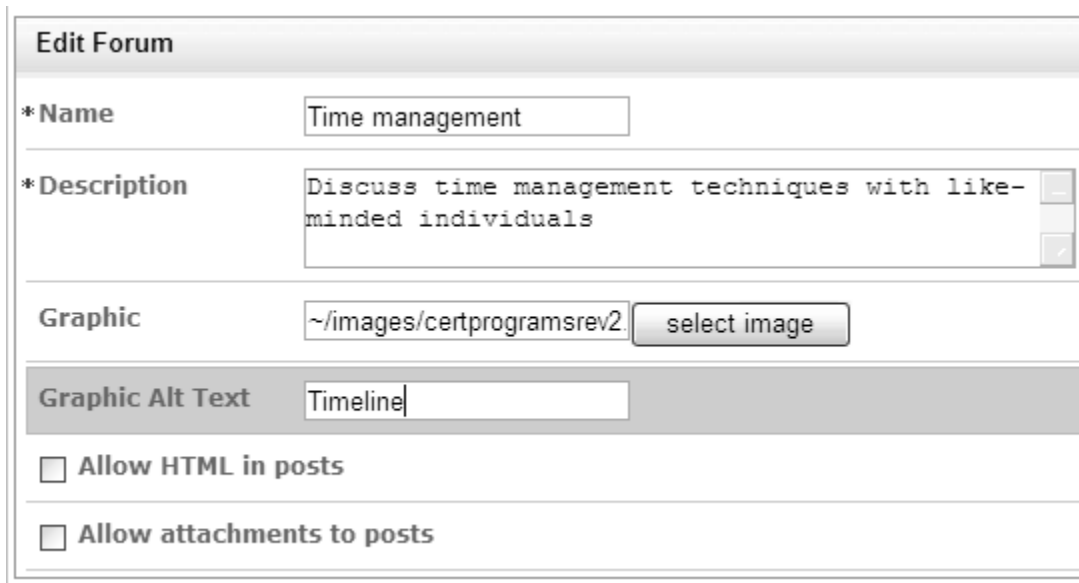
1. Log on as Community Administrator and open **Communities**.
2. From the **Community List**, select the name of the community to open it.
3. Under the **Forums** header, click **Add a Forum**.

If you do not see the **Add a Forum** link, verify that you are an administrator on the community.

4. Define the forum.
5. Click **OK**.

Edit Forum window

This window defines the properties of the forum list, such as the title and an image that represents the forum.



Select community link > Add a Forum or click the **edit** link under a forum

- **Name** - Specifies the name of the forum.
- **Description** - Specifies a description for the forum which is listed on the Community home page.
- **Graphic** - Specifies the graphic that displays in the upper left hand corner when the forum is displayed.
- **Graphic Alt Text** - Specifies the alternative text that appears when the graphic cannot be displayed or when you hover your mouse over the graphic.
- **Allow HTML in posts** - Select this checkbox to enable the HTML editor so that forum posts can have HTML in each. If this checkbox is cleared, you enter plain text when creating posts. When you enter a URL, *iMIS* automatically creates a link within the post, even if this selection is cleared.
- **Allow attachments to posts** - Select this checkbox to enable a poster to attach files separately to a forum topic, such as a PDF document or an image.

Adding moderators and wiki authors

If your organization cannot allow incorrect or inappropriate information making it into a forum or wiki, even temporarily, you can apply forum moderation and wiki authoring restrictions. Having done that, you should grant **Community Moderator** and **Community Wiki Author** roles to specific members to help develop and manage the content in those restricted areas.

To add moderators and wiki authors

1. Log on as an administrator and open **Communities**.
2. Open the target community and select **Security**, at left.
3. Select the **Community Moderators** tab.
4. Use the **Source** box to find members (they need not be subscribed to the community).
5. Select **Add** for each member who is joining the moderator role.
6. *Important!* Click **Save** before leaving the security tabs.

7. Repeat on the **Community Wiki Authors** tab, as needed.

To restrict a wiki to wiki authors

To limit authoring privileges on a wiki to a select group in your organization, you must

- edit the wiki and enable **Restrict authoring to Wiki Authors**
- add **Wiki Authors** to your community security (or else only administrators can change the wiki)

To enable forum moderation

To prevent posts from appearing on forums until they are approved, you must

- edit the community and enable **Community forums are moderated**
- add **Moderators** to your community security (or else only administrators can approve posts)

See [Enabling forum moderation](#) for best practices.

Removing inappropriate posts

Moderating community posts and comments is a job shared by all administrators of a community, to ensure speedy response to problems. Administrators get email notifications when posts and comments are reported as inappropriate, and they have the power to delete such content as needed.

To remove an inappropriate post or comment

1. When you receive an email indicating someone has reported a post or comment, read the content (which is copied into the email) for inappropriateness.
2. If the content seems inappropriate, click the link to go to it on the website, which opens in your default web browser.
3. **Log on.**
4. Click the **edit** link on the post and remove the offending portion, or click the **delete** link to remove the post entirely.

If you cannot see the **delete** link, make sure that you are logged on as a moderator.

5. Confirm by clicking **OK** on the resulting dialog box.
6. If you deleted a post erroneously, contact an *iMIS* SysAdmin have it restored.

To restore a post (SysAdmin)

You restore deleted posts by reverting them in the Document System. Be aware that reverting a post reverts only the selected post; any comments on the post must be individually selected and reverted if you want to also revert comments on a deleted post.

1. Logged in as a SysAdmin, go to **Tools > Document System**.
2. Click the **Recycle Bin**, and then select the post you want to restore.
3. Click **Versions**.
4. Select the post version that you want to restore.

Note: If you see an error, the reported post might have just been deleted by another administrator.

5. Click **Revert**.
6. Confirm by clicking **OK**.

Deleting a forum, blog, or wiki

Delete community areas carefully: although you can restore content after deletion, it's not convenient.

For example, each blog entry is its own document available in the Document System. You see the blog, all of its entries, and all of the entries' comments as individual items in the Recycle Bin in Document System. By selecting the item and clicking **Versions**, you can then select the version that you want to restore and click **Revert**.

Note: Reverting one object does not revert its dependents: you must restore each object individually, by reverting to a previous version.

To delete a forum, blog, or wiki (SysAdmin)

1. Log on as a user who is a member of the SysAdmin security role.
2. Click the **delete** link for the item you want to delete.
3. Click **OK** in the resulting dialog box.

Communities Implementation

Implementing **Communities** for optimal use requires the actions of an *iMIS* SysAdmin. During implementation, SysAdmins can

- hide **Communities** during implementation and then roll it out, using **Access Settings**
- customize the email notification template
- manage community attachments and uploads
- assign community administrators to their respective communities, to take it from there

Getting started: community management

Community management refers to the process of defining, organizing, and moderating portals that contain a file repository, blogs, discussion forums, or collaborative workspaces like wikis. Community management comprises the following activities:

- Defining communities and their resource libraries, blogs, discussion forums, or wikis
- Defining community display, navigation, and structure
- Moderating membership and conversations
- Defining notifications
- Defining security and access
- Managing document attachments

Who depends on this?

Your community management activities must be completed before members can view or post to forums, blogs, resource libraries, or wikis.

What must be done before you can start?

- You cannot perform some community management tasks until after a Community has been created in *iMIS*.

Putting it all together

Community management comprises two general workflows:

- The process of defining communities entails the following actions, which must be performed in the order shown:
 1. Define a community. By default, a Community contains iParts that enable addition of forums, blogs, wikis, announcements, and items in a resource library.
 2. Define the layout of the community's parts.
 3. Define notifications for the community.
 4. Manage the community roster and subscriptions.
 5. (optional) Manage limitations and definitions for file attachments.
- The process of community maintenance entails the following actions, performed as needed:
 - Manage security.
 - Moderate conversations.
 - Troubleshoot communities.

Types of user privileges

There are three system-defined security groups that affect user privileges relevant to managing communities.

- **Content Administrator:** member of a MasterAdmin Content Authority Group (CAG).
- **Community User:** A user who views or contributes to or authors community documents such as blogs, libraries, or forums, and may own a community document.
- **Community Administrator:** A user with the ability to set up communities and edit Community permissions. Belonging to this security group gives the user the ability to edit or delete community documents, regardless of the document's owner.

Understanding community permissions

The roles you assign to users control what they can do in blogs, wikis, and forums, as follows. Access settings are defined in the **Community Security** window.

Note: Granting a user, group or role ANY level of access to the community (even "Read") gives the user, group or role the ability to view the community and the ability to create posts and edit their own posts.

Enables	<i>Community Administrator</i>	<i>Content creator</i>	<i>Subscriber</i>
Forums			
Create or delete a forum	x		
Edit forum	x		
Edit forum topic	x	x	
Create or delete forum topic	x	x	x
Edit a forum topic	x	x	
Reply to a forum topic		x	x
Edit a reply	x	x	
Delete a reply	x	x	

Enables	Community Administrator	Content creator	Subscriber
Blogs			
Create blog	x	x	x
Delete blog	x	x	x
Edit blog	x	x	x
Create or delete blog entry	x	x	
Edit blog entry	x	x	
Comment on a blog entry	x	x	x
Edit or delete a comment	x	You must be an Admin to edit/delete comments on your entry.	
Wikis			
Create or delete wiki	x		
Edit wiki	x	x	x
Create wiki article	x	x	x
Delete wiki article	x	x	
Edit wiki article	x	x	x

Hiding and showing the Communities tab

Hiding the **Communities** tab during testing and content development lets you make sure members don't use their communities before they are ready for roll out.

To hide/show Communities

1. Select **Tools > Site designer > Manage sitemaps**, and select your sitemap from the drop list.
2. Click the **Communities** navigation item, scroll to **Access Settings**, enable **Apply changes to all descendants**, and select a new security set.
 - ☐ **Administrators Full Control** lets you hide the tab while you implement **Communities** on the site.
 - ☐ **Authenticated Users Full Control** lets you hide the tab until *after* members log in.
 - ☐ **Everyone Full Control** lets the general public see the tab without logging in.
3. **Save** your work and **Preview** your changes.
4. Repeat this process for any other sites for which you want to change **Communities** visibility.
5. **Publish** when ready.

Tip:

- It is possible to mismatch access so that a subscriber cannot access the community. Be sure your **Access Settings** are compatible between the sitemap and the community's **Security**.
- The link to **Communities** displays in a secondary navigation area.

Note: Membership in the **SysAdmin** security role effectively grants the full set of Document System permissions and the full set of CAG permissions (you are effectively a member of a **MasterAdmin** CAG too). However, to participate in web content authoring workflow, even members of the **SysAdmin** role must be an explicitly-listed member of at least one CAG.

Community Security window

This window defines access settings to control access to the community plus indicates which members are community administrators.

The screenshot shows the 'Community Security' window with the following sections:

- Community Administrators**: A header section.
- Current Group Members**: A section with a 'Name' dropdown and a message 'There are no records.'
- Select New Group Members**: A section with a 'Source' dropdown, a 'Select a Query' dropdown (set to 'Default'), a 'where ID equals' text input, and a 'Filter' button. Below this is a message: 'Please enter your search criteria to view results'.
- Access Settings**: A section with two radio buttons: 'Use a preconfigured security set:' (selected) and 'Make this available to:'. The 'Use a preconfigured security set:' option has a dropdown menu showing 'Everyone Read/Write'. The 'Make this available to:' option is followed by a table of 'Specific Roles'.

Name	Permissions
<input checked="" type="checkbox"/> Everyone	<input type="checkbox"/> Full Control <input checked="" type="checkbox"/> Read <input type="checkbox"/> Add <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete
<input type="checkbox"/> CompanyAdministrator	
<input type="checkbox"/> Fundraising Users	

Click a link to a specific community, and then click **Security**

Community Administrators

This area specifies selection of community administrators.

- **Current Group Members** - Lists the community administrators who have been added to the list. This list does not specifically display *iMIS* SysAdmin even though people with SysAdmin privileges appear on the community roster as Administrators.
- **Select New Group Members** - Specifies the search criteria for adding new community administrators.

Access Settings

This area specifies the access settings to the community based either on a preconfigured security set or specific roles, groups, or users.

- **Use a preconfigured security set** - Specifies a set of permissions for accessing objects. Each security set contains a predefined access list and permissions (**Full Control**, **Read**, **Add**, **Delete**, **Edit**) that remain constant. Refer to Shared security sets, for object-level access for information about preconfigured security sets.
- **Make this available to** - Specifies the **Specific Roles**, **Specific Groups**, or **Specific Users** that may have access to the community.

Note: Granting a user, group or role ANY level of access to the community (even "Read") gives the user, group or role the ability to view the community and the ability to create posts and edit their own posts.

Defining email notifications

See the Public view setup section for help with the Email templates window and Sample email customization.

To define the email notification address

1. On the appserver, open each *iMIS*-related **Asi.Workflow.Services.exe.config** file for editing. Its default location is C:\Program Files\ASI\iMIS\net\bin.
2. Edit this line to change the **from** attribute on the **smtp** element to the email address you'd like notifications to come from, and ensure your smtp server is properly named in the **host** attribute:

```
<mailSettings>
  <smtp deliveryMethod="network" from="myorg@myorg.com">
    <network host="smtp-server.myorg.local" port="25" defaultCredentials="true"/>
  </smtp>
</mailSettings>
```

3. Save the **Asi.Workflow.Services.exe.config** file.
4. On the appserver, restart the **AsiWorkflow15** service.
5. Repeat this process for each *iMIS* appserver that hosts communities.

To define the email notification message

1. Go to **System Setup > Set up web components > Email Templates**.
2. Change the default templates as you see fit. You can change the subject line, the body, and the footer of the notification email message. You can only change text that is not inside of square brackets.

Note: Text inside of square brackets [] indicates a variable that changes with each message that is sent.

3. Click **Save**.
4. On the appserver, restart the **ASIWorkflow15** service.
5. Restart IIS on the server (if your public website is installed on a separate web server) when you have made any modifications to the community notification email templates.

To configure email notifications with the Public view URL

Note: These instructions apply for the scenario where you want the links in email notifications to contain your Public view URL.

1. Log on as a user with the SysAdmin role.
2. Go to **Tools > Manage websites**.
3. Create a new web site by clicking **New > Website**.
4. Enter a name for the **Name/Title of this Website** field, such as "CommunityNotifications."

By default, the URL Name of this Website is populated with the same name.

5. Enter the URL of your public-facing website in the **URL(s) pointing to the IIS website root** field.

Note: To ensure email notifications are sent, be sure the option **The IIS website root (above) points to more than one CM website** is NOT selected.

6. Under **Site Look and Feel**, choose public.master for the **MasterPage/Template to use for the site's layout**.
7. Select **BlueWave** for the **Theme (colors, fonts, etc.) to use for the site's "look and feel"**.
8. **Save** the website.
9. **Publish** the website.
10. Edit the community and select the newly created and published website to be the **Default Website (for notifications)**.
11. On the appserver, restart the **ASIWorkflow15** service.

Tips

- When a Community Administrator has not yet been selected, notification emails are sent to every user with the SysAdmin role.
- For community subscribers, notifications are sent when someone adds or updates a post (blog entry, forum post, or wiki article) or comment on any of those items.
- By default, full text of the post or comment is included in the email message to subscribers.
- Any post included in the notification is marked as read by the subscriber.
- *iMIS* sends a message to the address specified in the **web.config** file as well as adds the designated email address to the from line because it only sends one e-mail per update and the blind carbon copy (BCC) line contains all of the recipients' email address. This design is more efficient for your mail server than sending out single email messages.
- For problems with emails, see email output not being sent or received in the Installation Guide.

Managing attachments and uploads

To configure the allowable file types

1. On the appserver, open each *iMIS*-related **web.config** file for editing.
 - **iMIS** default location: C:\Program Files\ASI\iMIS\net
2. Edit this line to add or remove file types in the value attributes.

```
<add key="Communities.AllowedUploadFileTypes" value="DOC,PDF, TXT,HTM,HTML,GIF,JPG,PNG,RTF, ZIP,XML" />
```
3. Refer to the list of the allowable file types that are specified in the **web.config** file entry.
4. Save the **web.config** file.
5. Repeat this process for each *iMIS* appserver that hosts communities where you want to change the allowable file types.

File Extension	File Type
AVI	Audio Visual Interleave
BMP	Microsoft device independent bitmap

File Extension	File Type
DOC	Microsoft Word Document
EML	Outlook Express Electronic Mail
FLV	Flash Video File
GIF	GIF Image
HTM	HTML Page
HTML	HTML Page
JPE	JPEG Image
JPEG	JPEG Image
JPG	JPEG Image
MOV	QuickTime Movie
MP3	MP3 Audio
MPG	MPEG Movie
PDF	Adobe PDF File
PNG	PNG Image
PPT	Microsoft PowerPoint Presentation
RA	Real Audio File
RAM	Real Audio File
RPT	Crystal Report Template
RST	SSRS Template
RTF	RTF (Rich Text Format) File
TIF	TIFF Image
TIFF	TIFF Image
TXT	Text File
WAV	WAV Audio File
WMV	Windows Media File
WPD	Word Perfect Document
WRI	Windows Write Document
XLS	Microsoft Excel Workbook
XML	XML File
ZIP	Zip File

To increase maximum upload file size

If your typical uploaded file size in your Resource Library or blog entries for example are larger than 100 MB, you can increase the maximum file size in **web.config** files associated with *iMIS*.

1. On the appserver, open each *iMIS*-related **web.config** file for editing.

- **iMIS** default location: C:\Program Files\ASI\iMIS\net

2. Locate the **<httpRuntime>** element and modify the **maxRequestLength** attribute.

```
<httpRuntime executionTimeout="3600" maxRequestLength="102400" />
```

3. Save the **web.config** file.

4. Repeat this process for each *iMIS* appserver that hosts communities where you want greater file sizes for attachments.

Tips

The following information can be helpful when managing file types.

- The MPE file type is sometimes used for MPG Video, but that file type is already in use for Mail Process Engine in *iMIS*. Rename .mpe files to .mpg in order to upload them to **Communities**.
- When a user attaches an XML file to a post and another user downloads it, the default file-opening behavior varies depending on the browser. In Internet Explorer, the XML file may take over the *iMIS* session, forcing the user to reconnect to the community through another browser window.

Troubleshooting

In order to prevent denial of service attacks, if a user tries to upload a file that is greater in size than the maximum allowed for uploads, the **Upload** dialog box displays an error. If users report that the **Upload** dialog box displays an error, check to see if their file exceeds the file size limit.

Be aware that increasing that value could result in a performance penalty on the webserver if the files being uploaded are too large for the server resources available such as available memory and CPU.

Communities Design

You have an advanced set of capabilities available to you, to support the communication and collaboration needs of the groups in your organization. You can

- redesign the layout of your communities (through its templates and themes)
- move and edit community iParts
- put community iParts into other web pages

Community display

A community content record defines the layout of a community's web page. Default community layouts are provided, but you can move the iParts on the page.

Administrators can always view the Communities list, but you will want to allow non-Administrator users to view the Communities once the display is to your liking.

If you want change the look and feel of a community page, you can do so in the following ways:

- By editing the website's definition and selecting different master pages and themes.
- By modifying the selected theme (which affects all websites that share it).

Community layouts

Three content records with different layouts for your community iParts are provided by default.

- The **Community** layout provides one of each type of Community iPart in a **TwoColumns50-50** layout.
- The **Community Description** layout has two iParts - one is an "About" iPart that displays the **Long Description** from the community definition, the second is a **Recent Activity** iPart that displays recent posts and comments.
- The **Community Post Summary** layout displays a **Recent Activity** iPart that displays recent posts and comments, an **Announcements** iPart in a **SingleColumn** layout, and a **Community Roster** iPart in a **TwoColumns50-50** layout.

Content records and iParts

A *content record* is an *iMIS* definition object, stored in the *Document System*, that specifies all the information needed to render a web page. Instead of hand-coding the contents of a web page for your *website*, you define some basic properties and *tags* for the content record, choose a *content layout*, add various *iParts* to the *iPart zones* in the layout, and then define the properties for each *iPart*. After the content record has been published to an **.aspx** file on the website, it is available for viewing by web browsers as a complete web page.

An *iPart* is a web widget in the ASP.NET environment. As with any web widget, you choose from different types of *iParts* to insert in the various *iPart zones* in the content layout, then you configure each *iPart* to populate that instance of it with the desired content. You can easily rearrange the rendered page contents by dragging an *iPart* to a different location within the *iPart zones*. A standard set of system-defined *iParts* are available in *iMIS*, but staff or consultants who are experienced in ASP.NET development can also easily add new *iParts* for use when authoring content.

- The standard *iParts* supplied in the **Content** gallery all have a corresponding content type, which tells *iMIS* how to create the corresponding *iPart* within the system, how to edit it, how to display it, how to publish it, and so on.
- New complex *iParts* that you add to your *iMIS* environment are also listed in the *iPart Gallery* and must also have corresponding content types.
- A special ASI-supplied **ContentWebUserControl** content type is used as a generic default content type for all simple *iParts*, or for ad-hoc web user controls that have been manually added to a content record.

To see the **Communities** *iPart* gallery, you need a **COMMUNITIES** license.

Defining the display of a community

To upload a graphic or image for the community

1. Log on as a user who is a member of at least one Master Admin CAG or a member of the SysAdmin security role.
2. There are two methods for opening a Community for editing:
 - Choose **Communities > Community List**. Add a community or edit an existing community in the list.
 - On the Community page, click **Edit** in the left-hand navigation area.The Edit Community window appears.
3. Next to **Graphic**, click **Select image**.
4. Either browse existing files in the Document System or upload a file, then click **Insert**.

To choose a community layout

1. Log on as a user who is a member of at least one Master Admin CAG or a member of the SysAdmin security role.
2. There are two methods for opening a Community for editing:
 - Choose **Communities > Community List**. Add a community or edit an existing community in the list.
 - On the Community page, click **Edit** in the left-hand navigation area.The Edit Community window appears.
3. Next to **Community Layout**, click **select**.
The Document System opens to the **CommunityLayouts** folder.
4. Select from one of three community layouts, or create your own content record with Community *iParts*, place it in the folder, and select it.
 - The **Community** layout provides one of each type of Community *iPart* in a **TwoColumns50-50** layout.

- The **Community Description** layout has two iParts - one is an "About" iPart that displays the **Long Description** from the community definition, the second is a **Recent Activity** iPart that displays recent posts and comments.
 - The **Community Post Summary** layout displays a **Recent Activity** iPart that displays recent posts and comments, an **Announcements** iPart in a **SingleColumn** layout, and a **Community Roster** iPart in a **TwoColumns50-50** layout.
5. Click **Save** to save the community with the new layout.
 6. To view the community with the new layout, click the link to the community.

To reposition an iPart on a community

1. Go to the community page.
2. Enable the *Surf-to-Edit* feature: click the Surf-to-Edit (STE) icon at top right.
3. Click the Content Record icon that represents the Communities content record, typically in the upper right hand corner of the record.
The Content Record window opens (see Fields: content records).
4. Click the blue bar of the iPart and drag it to another location in the content record.
An insertion bar indicates where you are inserting the iPart.
5. Release the mouse button to "drop" the iPart.
The iPart relocates to the place where the insertion bar displays.
6. If you want to remove an iPart completely, click the downward-facing triangle at the far right of the iPart's title bar, then choose **Remove**.
7. **Save** the content record.
8. **Publish** the content record.

When you click the link to the community page, the rearrangement of iParts displays.

To style the Communities tab

You may modify the CSS to change the style of the Community page and its iParts. You can create your own theme, or modify the CSS files located here: **C:\Program Files\ASI\iMIS\net\App_Themes**.

Tips

- The arrangement and relationships of the community parts to each other and to the website as a whole are important aspects of how the website users will navigate and how your website content is structured.
- What users see may be modified by their privileges.
- Only administrators have access to the management of the image associated with a wiki.

Troubleshooting

- If you decide you want to reverse your changes, you can do so. Every time you publish a content record, the previously published version is saved as an **Archived** version. You can revert to an older archived version by selecting the content record, and then from the toolbar choose **Versions**. In the resulting window, select an archived version and click **Revert**.
- Modifications to your master pages may be required if *iParts* appear to overflow the boundaries of *iPart zones* in the rendered pages. In general, this requires modifying the template's master page and accompanying CSS files to make the Home page and interior page layouts larger than their default size.

Community iParts

iParts Gallery Communities folder

This window lists the available iParts used to build community web pages.

Tips

- To see the **Communities** gallery, you need a **COMMUNITIES** license.
- To create a link to a content record, use a **ContentReference** iPart from the **Content** gallery.
- **Announcement Configuration** — The edit screen for the Announcements forum.
- **Announcements** — Displays the list of announcements for a given community.
- **Attachment List** — The rendered list of attachments for a given item.
- **Attachment Manager** — Allows controlling the list of attachments for a given item.
- **Blog Archive** — A list of blog archive links by month and year.
- **Blog Archive Entries** — A list of blog entries belonging to a particular archive set.
- **Blog Configuration** — The edit screen for blogs.
- **Blog Home** — The "home view" of an individual blog. By default, this 2-column view includes recent activity and archives to the right.
- **Blog List** — A list of blogs for a given community.
- **Blog List Item** — A single blog in a blog listing.
- **Comment Configuration** — The edit screen for comments.
- **Comment List** — A list of comments for a given item.
- **Comment List Item** — A single comment in a comment listing.
- **Community Breadcrumb** — Displays the path to the current object as a breadcrumb.
- **Community Configuration** — The edit screen for a Community.
- **Community Description** — Displays the full description for a Community.
- **Community List** — The list of all available Communities.
- **Community Recent Activity** — Displays recent activity of all types for the entire community, such as new replies on forum topics, new blog entries, and new wiki articles.
- **Community Roster** — Displays the list of all members (subscribers and administrators) of a community.
- **Community Sidebar Helper** — Helper control that inserts the Community Summary into the template's sidebar.
- **Community Summary** — Displays the item's linked name, image, description, and relevant links.
- **Entry Configuration** — The edit screen for blog entries.
- **Entry Home** — The "home view" of an individual blog entry. By default, this 1-column view includes the complete comment thread for the entry.
- **Entry List** — A list of entries for a given blog.
- **Entry List Item** — A single entry in an entry listing.

- **Forum Configuration** — The edit screen for a forum.
- **Forum Home** — The "home view" for a forum. By default, this 2-column view includes recent activity to the right.
- **Forum List** — The list of forums for a given community.
- **Forum List Item** — A single forum in a forum listing.
- **Image Manager** — Image manager for a community.
- **Preferences** — Manages a user's community preferences and subscriptions.
- **Recent Activity** — Displays a recent activity in an individual blog or forum in a particular community.
- **Resource Library** — Displays the Community Resource Library.
- **Security** — Manages a community's security.
- **Subscription Link** — Allows a user to subscribe to or unsubscribe from a given item.
- **Topic Configuration** — The edit screen for a forum topic.
- **Topic Home** — The "home view" for a forum topic. By default, this 1-column view includes the complete reply thread for the topic.
- **Topic List** — A list of topics for a given forum.
- **Topic List Item** — A single topic in a topic listing.
- **Wiki Configuration** — The edit screen for a wiki.
- **Wiki Contents** — The Table of Contents list for a given wiki.
- **Wiki Home** — The "home view" of a wiki. By default, this 2-column view includes a table of contents to the right.
- **Wiki List** — The list of wikis for a given community.
- **Wiki List Item** — A single wiki in a wiki listing.

Or, enter a path to a web user control

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS web site that hosts your CM websites to a web user control that you want to insert into this content record. By default, the root corresponds to **C:\Program Files\ASI\iMIS\Net**. For example, `~/CustomControls/myUserControl.aspx`.

For more information, refer to Defining custom iParts as content types.

Note: Be sure to use forward slashes (/) for the URL segment delimiters.

Including a Community iPart on a web page

1. Log on as a user who is a member of at least one Master Admin Content Authority Group or a member of the SysAdmin security role.
2. Create a community and a forum, blog, resource library, announcement, or wiki that you want to include in another web page.
3. Using a web browser, navigate to the community item that you want to include in another web page.
4. On the web address for the page you want to include, find the **iUniformKey=**, a string of 36 characters and numbers.

5. Open the content record where you want to include the Community iPart. There are two methods for opening a content record for editing:
 - In the **Definition** section of a *content record*, click **add content**, then select the **Content** gallery and add one of the listed iParts to the content record. (Alternatively, for an existing iPart, click the down triangle at the far right of the iPart's title bar, then choose **Configure**.)
 - When using the *Surf-to-Edit* (STE), click the STE icon that relates to various iParts in the content records used in the *content areas* of the page. You must be logged on to the website and have **Content Editor** permissions in at least one *content authority group* (CAG).
6. Click **add content**.
7. Select an iPart in the **Communities** folder, such as **Blog List**.
8. Enter a name for the new content.
9. Under **Community Item Key**, enter the iUniformKey you copied from the URL as specified below.
10. Save the content record.
11. Publish the content record.

To locate the Community Item Key

1. Using a browser, navigate to the community item listed in the table below.
2. Copy the 36-character **iUniformKey=** string from the web address.

Note: If you cannot right-click to see **Properties** on a link, edit the **web.config** file for the website. Search for **Browser.DisableContextMenu** and change the value from "true" to "false".

To get key for:	Copy iUniformKey from:
Community	web address for the Community home page
Announcements forum	On community home page, right-click the "Configure" link in the Announcements section to view Properties.
Forum	web address for the forum home page
Forum Topic	web address for the topic home page
Forum Topic Reply	on a reply, right-click the "report" link to view Properties
Blog	web address for the blog's home page
Blog Entry	web address for the blog entry's page
Blog Entry Reply	on a reply, right-click the "report" link to view Properties
Wiki	web address for the wiki home page
Wiki Article	on an article, right-click the "report" link to view Properties

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Understanding Marketing Suite

iMIS Marketing Suite gives your organization the flexibility to support any marketing need, from basic to complex. The Marketing Suite helps you manage:

- Fundraising campaigns, such as donor activation, reactivation, and/or renewal

- Membership campaigns, such as membership recruitment, reactivation, and/or retention
- Events and conferences
- Lead generation projects
- Publications marketing
- Public awareness campaigns
- Legislative action initiatives

With the Marketing Suite, you can define and manage a coordinated series of marketing tactics, manage the responses, and analyze the results. Use the Marketing Suite to:

- Plan and create campaigns that follow your organization's goals and requirements
- Match the message to the target
- Simplify campaign execution
- Link packages to customer segments
- Automate response follow-up tasks and move contacts to the appropriate stage in a multi-stage campaign
- Track budgets at a high level or at a detailed level
- Use analysis tools to monitor campaign success at each level

The Marketing Suite offers three areas that can work together to help you achieve your marketing objectives:

- **Campaign Management** – Plan, create, and track single or multiple campaigns
- **Segmentation** – Segment contacts and prospects according to demographic and behavioral patterns
- **RFM Analytics** – Rank a contact's past transactions with your organization

You can use Campaign Management alone or you can use the three solutions together to take advantage of data analytics and advanced segmentation capabilities. This will help your organization target the efforts in the most cost-effective and customer-focused manner.

Campaign Management

Use Campaign Management to plan, create, and track your marketing campaigns. You can manage basic campaigns with a single customer mailing or complex campaigns with multiple appeals and solicitations.

Depending on your organization's needs, you can choose to:

- Define campaigns and categorize them by type
- Define specific goals and measure campaign performance against those goals
- Communicate with targeted prospects through a series of personalized solicitations
- Track and analyze responses

Campaign Management hierarchy

Campaign Management uses a four-tier campaign structure, so you can plan actions and monitor results to the detail level you need. A default hierarchy is supplied with the system. However, you can rename the hierarchy to reflect your organization's or industry's terminology.

Campaign Management tiers

Campaign

A strategy to accomplish a single marketing goal, such as a membership drive, a fundraising campaign, an annual convention, or a legislative initiative. Campaigns are the highest level of measurement and are typically project-driven.

Appeal

Each major marketing effort of a campaign, usually associated with a *drop date*. An appeal can be:

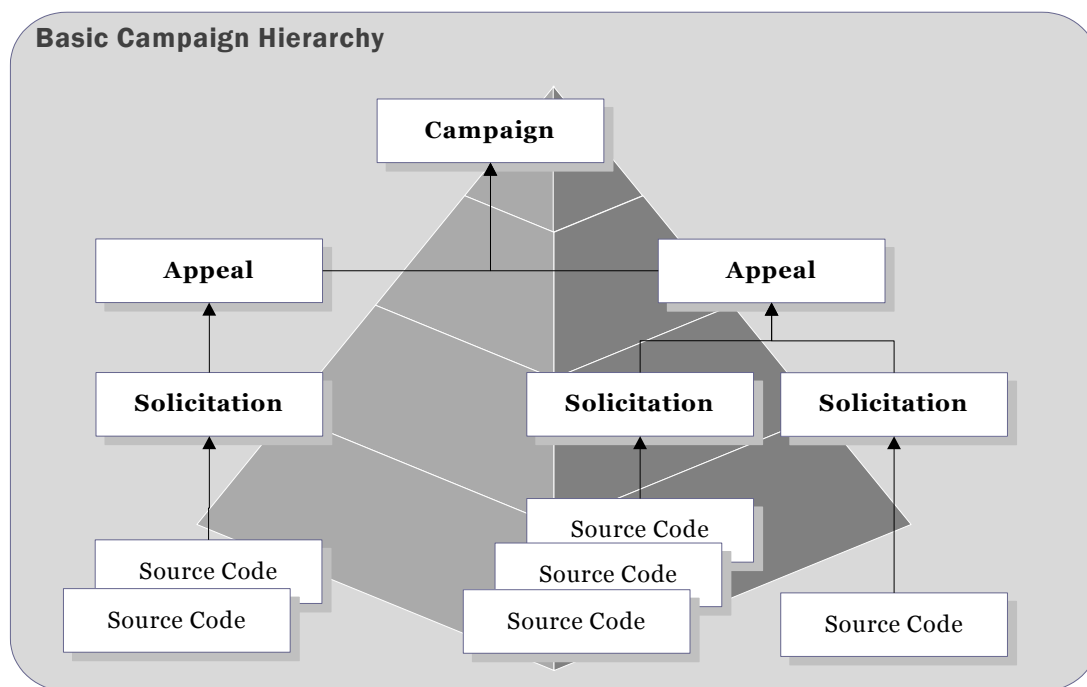
- A phase of the project, such as "First Request" or "Airwaves Blitz"
- A portion of the campaign targeted to a specific group of contacts or prospects
- A portion of the campaign assigned to an internal group (generating mailing lists, designing artwork, managing responses)

Solicitation

A series of communication pieces for an appeal. For example, a "First Request" appeal might direct different messages to previous donors/customers than to prospects.

Source codes

Numbers assigned to each communication piece to track responses. These numbers are associated with reply devices (postcard, website checkbox) so your organization can measure the effectiveness of each solicitation. Source codes are the most granular level of measurement.



Default campaign hierarchy

Basic and complex campaigns

Generally, basic campaigns are sufficient for small events, simple marketing campaigns, limited public awareness campaigns, and similar goals. For the purposes of this discussion, basic campaigns:

- Contain few appeals and related solicitations
- Probably use only one or two source codes per appeal

More complex campaigns require efficient management and tracking of multiple, multi-tiered campaigns. For the purposes of this discussion, complex campaigns:

- Contain many appeals and related solicitations
- Use many source codes
- Often build on the targeting and analytical data generated by Segmentation and RFM Analytics

Segmentation

Use Segmentation with Campaign Management to group contacts and prospects into targeted audiences. With Segmentation, you can:

- Create targeted contact and prospect lists according to demographic and behavioral patterns or other include/exclude criteria
- Split segments into multiple lists and prioritize the segments
- Eliminate duplicates in lists
- Create *n-select* or random select segments for message or delivery testing
- Get counts for communications collateral before production
- Assign unique source codes to segments to effectively analyze an effort's success

RFM Analytics

Research proves that a contact's past transactions with an organization indicate the likelihood of future responses. The more money a contact spends with an organization and the greater the frequency of the transactions, the more likely the contact will respond to future campaigns.

Use RFM Analytics with Segmentation to rank and organize your contacts and prospects into specific groups according to the relative *recency*, *frequency*, and *monetary* value (RFM) scores of their transactions. RFM Analytics gives you the ability to:

- Rank and organize your contacts into specific groups
- Record a contact's first, last, and highest transaction amounts and the dates of the first and last communication
- Generate segments that divide the population into categories based on RFM criteria
- Create groups, such as quintiles, that reflect the relative ranking of customers according to all RFM measurements

All statistics can be calculated for the source code, solicitation, appeal and/or campaign to provide the amount of summarization your organization requires. The available statistics include:

- Response rate
- Average, highest, and lowest transaction amount
- Dates of first response and last response
- Costs (actual cost, cost per thousand, estimated cost, overhead cost, total cost)
- Revenue (total revenue, net revenue, revenue per thousand, ROI)

Communications and reporting

iMIS communications tools help you to efficiently build customized messages for your contacts and prospects. You can gain valuable information about the effectiveness of your campaign with reports about the campaign or a portion of the campaign. These messages and reports can be generated at any level of a campaign.

Default templates for messages and reports are provided and are easily tailored to your organization's specific needs. In addition, the following communications tools give you the power to construct custom communications pieces:

- MS Word merge
- Email merge
- Crystal Reports
- Broadcast fax

Many *iMIS* communications features help you perform efficiently:

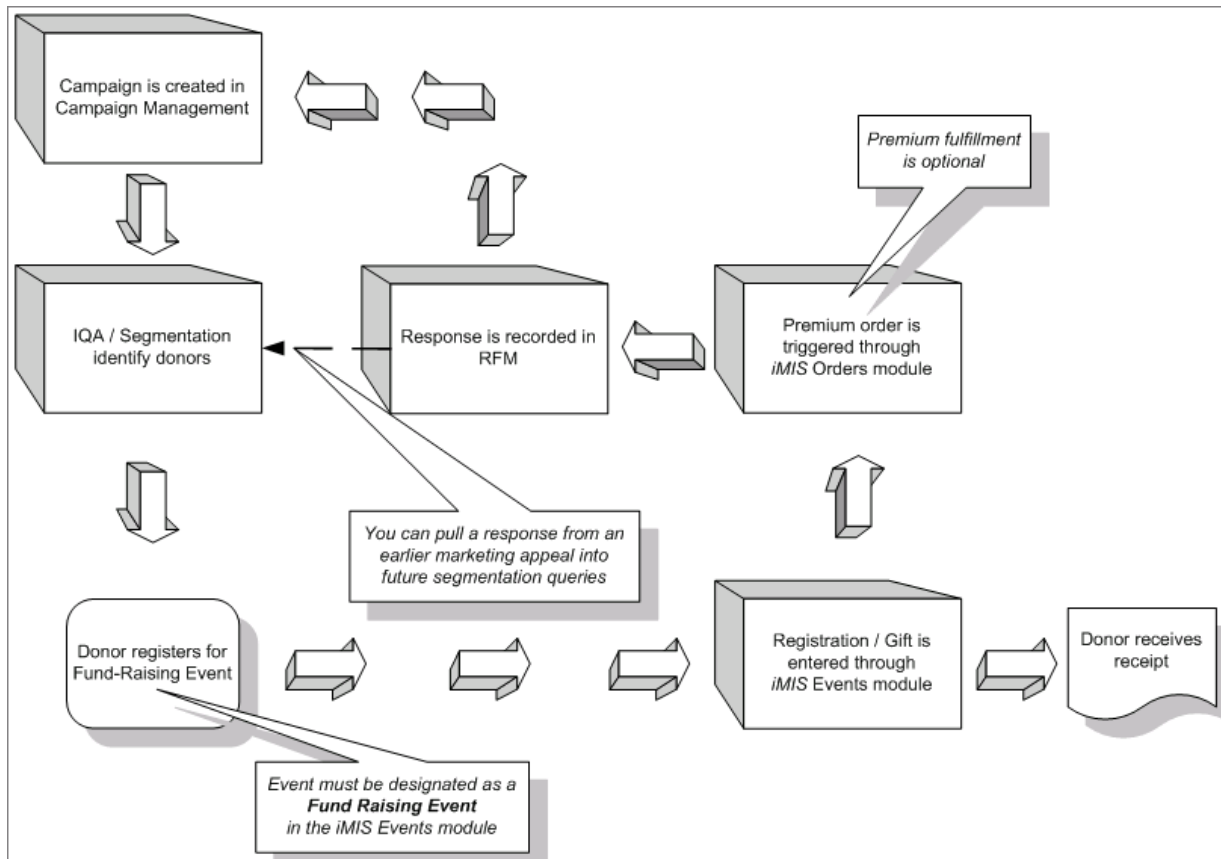
- Use saved report selections from other *iMIS* functionality for merge lists
- Preview merged messages and edit them before sending
- Combine email merge and fax merge into one mass mailing with timed delivery
- Combine multiple queries into one mailing
- Send merged event confirmations for a single event or for all events
- Export source lists to external vendors, fulfillment providers, or listservs
- Reprint event confirmations as needed
- Send updates to the activity history display
- Collect email bounce-backs
- Ensure that broadcast email messages are not blocked as spam
- Generate projects based on complex business rules or in response to a campaign

Marketing Suite integration across *iMIS*

The most powerful feature of Marketing Suite is its integration throughout the *iMIS* system. If you choose, you can:

- Designate appropriate orders and donations as responses to the campaign
- Send personalized acknowledgements to the contact via their preferred method of communication
- Use responses to previous solicitations for future targeting and list segmentation

The following diagram illustrates the advanced integration that is possible between Campaign Management and other *iMIS* features.



Example of Marketing Suite interaction throughout iMIS

Marketing Concepts and Terms

Basic and closed-loop marketing principles

There are many different types of marketing efforts used by a variety of different sectors, such as:

- Retail marketing
- Fund raising
- Brand marketing
- Membership
- Issue awareness
- Event marketing
- Calls to action

Each of these forms of marketing uses a series of principles and practices to meet their goals. The principles discussed in the following topics reference database marketing practices for the not-for-profit sector. These are general, high-level concepts, but each organization performs marketing in a unique manner.

Customer-focused marketing

Being customer-focused means that marketing efforts need to balance the goals of the organization with the needs of their "customers" (contacts, members, donors, prospects, legislators).

Customer-focused organizations integrate their customer service department and website content with current marketing efforts to offer choices. By offering choices, they open opportunities for customers to respond to the call to action. That way, the customer chooses when and how they want to hear from the organization.

For years, these organizations have used focus groups and other consumer index information to help determine what their product offering should be. More and more, focus groups and customer surveys are being used to determine how an organization is perceived by its supporters. After the questions are asked and the numbers are in, organizations are changing how they speak to their supporters.

Customer satisfaction is a relatively new key metric that organizations seek to determine. Ways to measure customer satisfaction include:

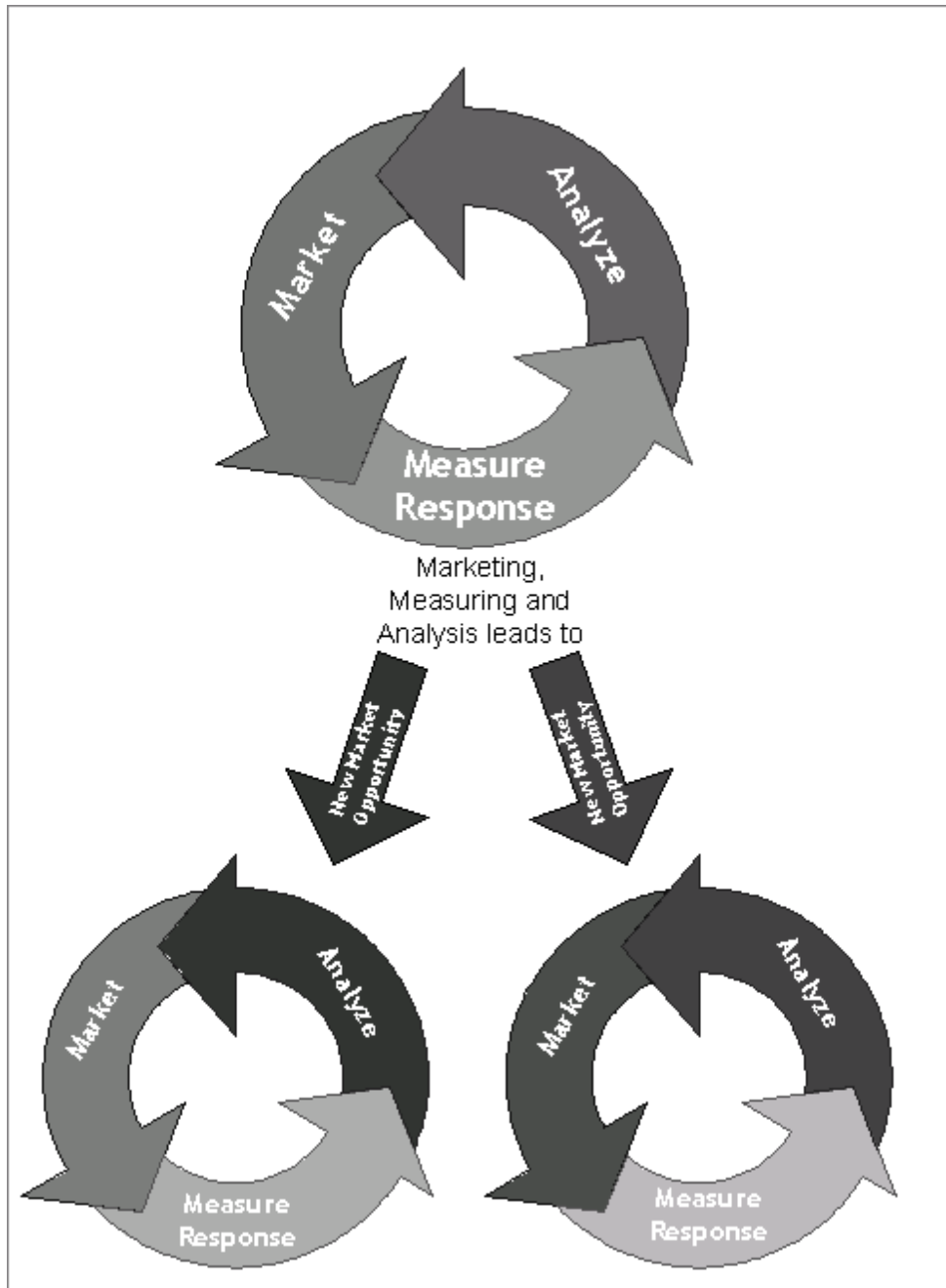
- Conducting a survey – Extract a list from your database, develop customer satisfaction questions, call or send the survey to your customers, record the responses, and analyze the results.
- Integrating short surveys into your customer service activities – Add questions to a donor reply device or a membership renewal package.
- Offering a survey on your website.
- Encouraging your customer service staff to ask questions when they are on the phone with your customer and to record the answers.

A key component to being customer-focused is responding to supporters when they take the time to ask a question or express a concern. Respect for the customer is the key to maintaining high customer satisfaction ratings.

Measuring customer satisfaction is integrally tied to managing your key business processes well, particularly your customer service processes.

Closed-loop marketing

The closed-loop marketing approach measures the results of marketing and communication initiatives by tracking the response of targeted groups. The results of responses, such as completed surveys, promotional entries, coupon redemptions and purchase behavior, are added to a database for tracking and evaluation to improve future marketing decisions. Marketing campaigns can then continuously adapt to the customers' wants and needs, creating a true relationship. Simply put, marketers can develop and monitor targeted strategic campaigns based on a wide variety of customer histories and behaviors.



Closed-loop marketing process

Organizations do not leap into target marketing. Organizations that are working towards a targeted closed-loop approach plan the introduction carefully and over some time, beginning with developing a segmentation strategy.

Closed-loop marketing involves a never-ending cycle of ongoing analysis, ongoing marketing, and ongoing response management. As we market, we learn. As we learn, we develop new marketing strategies. New marketing strategies lead to changes in how we manage responses.

New market opportunities are identified through trend analysis. A new opportunity may address a weak area within a marketing plan or may identify a new group.

Closed-loop marketing refers to the cycle of:

1. Developing metrics and benchmarks for the desired transactional behavior
2. Ensuring that business processes are in place to maximize the customer's experience and to build loyalty.

In essence, once a customer is introduced into our loop, we ensure that they never want to leave.

The role of segmentation

Segmentation is the science of dividing up all of the records in an organization's database into small groups that can be marketed to and measured over time. It is the way in which we apply demographic, mood, and transactional data to our marketing activities.

Most organizations that have a segmentation model are able to provide detailed descriptions of what those segments are and when they approach them. Organizations without a segmentation model need to plan one carefully. Segmentation strategies change from organization to organization. This is because the mission of each organization is unique and the characteristics that make up its supporter base are equally unique.

Segmentation usually begins by defining broad audience groups. However, audiences should not be considered as isolated groups; they may support the organization in a variety of ways. By recognizing that these relationships exist, an organization can offer personalized targeted marketing.

Types of data

A variety of data can be used for targeted marketing:

- Demographics
- Psychographics
- Transactional data

In order to be customer-focused, an organization's data segmentation strategy must include customer communication preferences and can include individual customer satisfaction rankings.

Demographics

Demographic data helps identify groups based on information like age, gender, geographic location and marital status. Demographic data is core to understanding what groups may be likely to perform in what way.

Acquiring demographic data about customers may or may not be easy to do. Some associations require that date of birth and other demographic information be provided. Other associations may be bound by privacy rules that may make it harder to capture this information.

Demographic data can be acquired from outside sources. For instance, you can recruit the services of a vendor who has access to income tax data and other filed information.

Psychographics

Psychographics refers to how someone behaves: their likes, dislikes, interests, and key values. Although demographic data generally remains consistent, psychographics change. A key measurement of psychographics is customer mood. Customer moods change based upon how an organization interacts with a customer.

Psychographic data is usually gathered through polls and surveys.

Transactional Data

Analyzing transactional data is critical to measuring customer satisfaction and loyalty.

RFM (Recency, Frequency, Monetary Value) is a common way of scoring transactions and determining loyalty and value. By establishing a matrix of values, you can measure where a customer ranks within the matrix and the direction they are migrating.

RFM is the science of developing this matrix of scores based on values we associate with the scores. In the end, records are grouped together based on their rankings. They share their support in common. Because the rankings are standardized, it is a very statistically valid way of building a standardized segmentation model. The RFM scoring process inherently converts flat data files into three dimensional data files.

Other ways of looking at transactional data are available but they are one dimensional in nature:

- Last Year But Unfortunately Not This (LYBUNT)
- Second-to-Last Year But Unfortunately Not This (SYBUNT)
- Third-to-Last Year But Unfortunately Not This (TYBUNT)

This data measures only one RFM characteristic: Recency. You cannot use a LYBUNT, SYBUNT, TYBUNT report for identifying your best customers; its purpose is to identify the erratic donor.

High-value customer reports are also common for measuring value, but judgments made solely upon value can be misleading in determining customer strategies. For example, should you spend time building a relationship with a customer who has given you a lot of money but not for the past five years? Or, should you spend time building a relationship with a customer who has given less financial support but given it very recently? Or, very loyally every year for the past ten years?

Reports and analytics that focus on only one element of the transaction can be misleading. The RFM approach is preferred because of its ability to slice data three ways.

RFM is also ideal because it can be implemented easily and regularly within a database. Ideally, data should be reviewed with a vendor/partner who specializes in understanding marketing statistics and segmentation, but this is not always necessary. Other more advanced data analytic services are also available, but can be expensive and difficult to implement and are best used to develop a predictive model.

A predictive model is used to consolidate all of the demographic, psychographic, and transactional data available to the organization into a data algorithm that can be used to target records that appear to be becoming a target market. For example, a "lapsing customer" model can identify customers whose loyalty is waning before they disappear. Or, a "planned giving" model can identify the point at which we've learned the two or three key criteria that we need to gather to qualify a planned giving prospect.

Predictive models generate leads for a different marketing strategy. Marketing campaigns/appeals follow through on those leads. Data underlies the success of these marketing efforts.

Using Different Types of Data to Enhance Marketing Efforts

Source Code assignments fall into three basic categories:

- Codes assigned to outgoing marketing efforts to track the incoming responses to the effort that recruited the support
- Generic codes that are assigned to ongoing 'passive' ways in which a customer can support an organization, such as web transactions, general acknowledgement responses, pass-to-a-friend, catalogs, or cards
- Unknown codes that are assigned to capture responses when the actual source code is not known

Assign source codes to outgoing marketing efforts to be able to track how contacts respond. A source code is assigned to each segment within an outgoing marketing effort and is printed on a reply device (the form the customer returns to the organization). Printing the source code on the information the contact receives allows for it to be data entered easily when an incoming transaction is received. Essentially, source codes should exist at any time that a contact is presented with a project to support. This opportunity is a call to action.

Source code tracking is important. To maintain the highest possible accuracy in recording the actual source code assigned to a contact's response, key processes have to be highlighted. Data entry staff need to know the importance of accurate data entry and, in a customer-focused closed-loop model, quick and accurate acknowledgements should be sent to the contact, thanking them for their response.

Entering the correct source code on incoming transactions is important for thanking the contact properly. An error might result in a complaint to your customer service staff or it might convince the contact to stop supporting your organization.

What feeds source codes into Campaign Management?

Campaign Management: The 'source' for the Campaign is your source code. The source code is your list of members/prospects that a campaign/appeal/solicitation is targeted to and the output is generated for. This list of members for a specific source code comes from a segmentation job or definition, a query or a group of solicitation responses.

Segmentation: When you generate a segmentation job consisting of 1 or more segment definitions you are creating a source list for your campaign/appeal/solicitation. A source code in Campaign Management can pull from the whole job or just one of the segment definitions.

RFM Analytics: You can use RFM analysis to generate queries to use in Segmentation to help create the segments. In this way, RFM helps create the segment definition that is used as a source list for a source code in Campaign Management.

Process Management: When you create a new opportunity, on the Definition you can select a Source Code. This is more informational than functional in that it lets you record which Source Code for a specific campaign/appeal/solicitation may have generated the opportunity.

Testing the marketing plan

The move from mass marketing to targeted closed-loop marketing is usually accomplished through testing. Best practices for testing include:

- Test one thing at a time.
- Determine a goal/objective for your test. It is important to know that you are doing what you set out to do.
- Understand what makes for a statistically valid result. The simple rule of thumb is to include enough records in your test to ensure that you receive at least 100 responses.

Market testing within your own database requires that you use random segmentation selections. This means that you establish a group that you would expect to perform in a particular way and then randomly select the number of records you want to test against.

Statistical validity is measured not just by having test groups of the right size, but also by the use of control groups. Test groups must be measured against a control group. The control group will receive the same package as usual or be the same group as usual. This group will receive the usual expected result unless an outside phenomenon changes the outcome. The test group will perform differently than the control group.

If the objective is to "recruit more donors", then you can not say that the test failed because the return on investment is lower than the control group. Return on Investment is a different metric than percentage return. The percentage return better measures if this objective was met.

To accurately determine whether a test is successful, it should be repeated. Future campaigns should repeat the test on new groups of randomly selected records. After the test has produced similar results three or four times, consider increasing the size of your test groups and introducing your new tactic on a permanent basis. Again, vendors can work with you in developing tests, measuring their effectiveness, and deciding when the test has finished successfully.

Terms to know: Campaign Management

actual cost

Calculated as follows when Budget Level is set to Source Code:

(total insert costs x actual number of contacts solicited) + (overhead costs of source codes for which output has been generated)

appeal

Each major marketing effort of a campaign, usually associated with a drop date. An appeal can be:

- A phase of the project, such as "First Request" or "Airwaves Blitz"
- A portion of the campaign targeted to a specific group of contacts or prospects
- A portion of the campaign assigned to an internal group (generating mailing lists, designing artwork, managing responses)

average transaction amount

Total Revenue divided by the total number of all orders, gifts, and pledges attributed to one of the following:

- Source code
- All source codes within a campaign, an appeal, or a solicitation

campaign

A strategy to accomplish a single marketing goal, such as a membership drive, a fundraising campaign, an annual convention, or a legislative initiative. Campaigns are the highest level of measurement and are typically project-driven.

campaign type

Object for organizing and grouping specific and similar campaigns. The following campaign types are available by default:

- **None**
- **Annual** - Campaign that occurs every year
- **Designated** - Funds generated by the campaign are committed to a specific entity
- **Undesignated** - Funds generated by the campaign are not committed to a specific entity. The organization decides how to allocate the funds, unless specified by the donor.

cost per thousand

Equal to the following:

- For each campaign, appeal, and solicitation:
(Actual Cost x 1000) / number of pieces mailed

- For each source code when Budget Level is set to Source Code:

$(\text{Total Cost} \times 1000) / \text{number of pieces mailed}$

count

Total records in an external list

current response rate

Equal to the following for each campaign, appeal, solicitation, and source code:

$\text{number of responses received} / \text{number of pieces mailed}$

date of first response

Date a contact first responds for each campaign, appeal, solicitation, and source code

date of last response

Date a contact last responded for each campaign, appeal, solicitation, and source code

drop date

The definition of drop date depends on the media involved:

- Direct mail – Date delivery begins
- Telemarketing – Date calls begin
- Media spots (TV, radio, webcast) – Air date
- Newsletters – Date of issue mailing
- Online campaigns – Date email messages are sent

Drop dates for other efforts can include:

- Date the mailing list is generated
- Date the creative concepts/artwork is complete
- Date the response management process is set up

dummy/test selects

Practise run to verify counts. Many organizations run dummy or test selects prior to their anticipated mail date to see the final counts and to modify the criteria if the numbers are not what they anticipate.

During the production process, counts are usually required for:

- Accurately determining postage costs (usually pre-paid)
- Determining print quantities
- Determining print quantities by package

estimated cost

Calculated as follows when Budget Level is set to Source Code:

$(\text{total insert costs} \times \text{estimated number of contacts solicited}) + (\text{source code overhead costs})$

external filename

Name of an external list

highest transaction amount

Maximum of all orders, gifts, and pledges attributed to one of the following:

- Source code
- All source codes within a campaign, an appeal, or a solicitation

insert

Physical item sent to a contact such as a merge letter, pre-printed collateral, or envelope

insert type

Object for organizing and grouping specific and similar inserts. The following insert types are available by default:

- None
- Brochure
- Envelope
- Form
- Postage

kill file

Files from an external source that have been checked for duplications and merged/purged with an organization's *iMIS* database and rented lists

last drop date

Date of the last output generation

list member type

Method of grouping list members into general types. The default list member types are **Contact** and **Prospect**.

list type

Method of organizing source lists by type. The default List Types are **Query**, **Segment Definition**, and **Solicitation Response**.

lowest transaction amount

Minimum of all orders, gifts, and pledges attributed to one of the following:

- Source code
- All source codes within a campaign, an appeal, or a solicitation

net revenue

Calculated at the campaign, appeal, solicitation, and source code levels as:

Total Revenue – Actual Cost

operational costs

Costs for anything that applies to the marketing effort as a whole, such as:

- Lettershoppping
- Printing
- Paper

output process

A process-oriented task, for example, a Crystal report, MS Word merge, or query

overhead cost

The sum of expenses entered for each appeal (when **Budget Level** is set to **Appeal**) or source code (when **Budget Level** is set to **Source Code**)

package costs

Costs for anything applied to the package, such as:

- Postage
- Outer envelope
- BRE
- BRD
- Telemarketing costs

predicted response rate

Percentage estimate of contacts responding to each appeal (when **Budget Level** is set to **Appeal**) or source code (when **Budget Level** is set to **Source Code**)

response media

The origin of an opportunity, such as email, web, telephone, or postal mail

response stage

Pre-defined stages in the source code so that a contact moves through campaign stages as they respond to solicitations

response state

The configuration setting for including contacts in specific campaign stages based on response history:

Solicited – Contact has been solicited but has not responded.

SolicitedResponse – Contact has responded to a solicitation.

UnsolicitedResponse – Contact has responded but was never solicited.

OptOut – Contact has opted out of the solicitation.

revenue per thousand

Equal to the following for each campaign, appeal, solicitation, and source code:

$(\text{Total Revenue} \times 1000) / \text{number of pieces mailed}$

ROI percentage

Equal to the following for each campaign, appeal, solicitation (**Budget Level** set to **Source Code**), or source code (**Budget Level** set to **Source Code**):

$(\text{Total Revenue} - \text{Actual Cost}) / \text{Actual Cost}$

seed lists

Lists of individuals within the organization sending the campaign. These lists are often included to confirm the mail date and to distribute samples internally.

solicitation

A series of communication pieces for an appeal. For example, a "First Request" appeal might direct different messages to previous donors/customers than to prospects.

source code

Numbers assigned to each communication piece to track responses. These numbers are associated with reply devices (postcard, website checkbox) so your organization can measure the effectiveness of each solicitation. Source codes are the most granular level of measurement in a campaign.

source code ID mode

Configuration setting to generate source codes manually or automatically

source code type

Indicates whether source code list sources are defined by internal data or by an external file. Default source code types are Run Once, Run Many, and External List.

source list

List specifying contacts to be solicited

synchronize responses

Option that triggers the response recognition process

target revenue

Monetary goal for each campaign and appeal (when Budget Level is set to Appeal) or for each solicitation and source code (when Budget Level is set to Source Code)

total cost

Calculated according to budget level:

- Budget Level is set to Appeal – equals the sum of all overhead costs for an appeal and for all appeals within a campaign. Insert costs are ignore). The displayed Total Cost is always up-to-date with the current cost of all sub-items. Because Total Cost calculation relies solely on overhead costs, Total Cost is never estimated.
- Budget Level is set to Source Code – Total Cost (Actual or Estimated) displays for each campaign, appeal, solicitation, and source code

total revenue

The sum of all orders, gifts, and pledges attributed to all source codes within a campaign, an appeal, or a solicitation

Terms to know: Segmentation

n-Select segments

A portion of the entire population that is the target for a campaign. The results returned by a selection filter are divided into a number (n) of segments, with the same number of contacts or prospects in each segment.

segment

Portion of the entire population that is the target for a particular marketing campaign. A segment organizes customers and prospects according to demographic and behavioral patterns.

segment definition

Specifications for an individual segment within a segmentation job. A segment definition can be a query segment or an n-Select segment.

segmentation job

A mechanism for establishing all of the segments in a marketing campaign. This allows segments to be added, deleted, and tested. The segments can then be assigned to individual source codes and created in one process rather than individually creating each segment.

Terms to know: RFM Analytics

frequency

Number of times a contact has transacted with an organization

monetary

Individual or cumulative value of a contact's transactions with an organization

population query

Defines the population (contacts) used for RFM analyses. The population query references an IQA query that extracts users from an existing set.

quintile

Any of the four values that divide the items of a frequency distribution into five classes with each containing one-fifth of the total population

recency

Period of time (in days or months) that has elapsed since the last transaction between a contact and an organization

transaction query

Defines the transactions considered for RFM analysis. The transaction query references an IQA query.

Setting up Basic Campaigns

Campaign Management helps your campaign staff set up and manage "basic" campaigns easily. For the purposes of this document, basic campaigns:

- Contain few appeals and related solicitations

- Generally use only one or two source codes per appeal
- Use the Select and Send model – Select the target audience from the *iMIS* database or an external list, send communications to that audience, and track incoming responses

With Campaign Management, campaign staffers can:

- Plan and define basic campaigns
- Create and send appropriate communications material
- Monitor campaign performance

What must be done before you can start?

You cannot set up a basic campaign until the following setup tasks are complete:

- Define setup options for all campaigns
- Set up security groups for campaigns

Putting it all together

The process of basic campaign management includes the following actions:

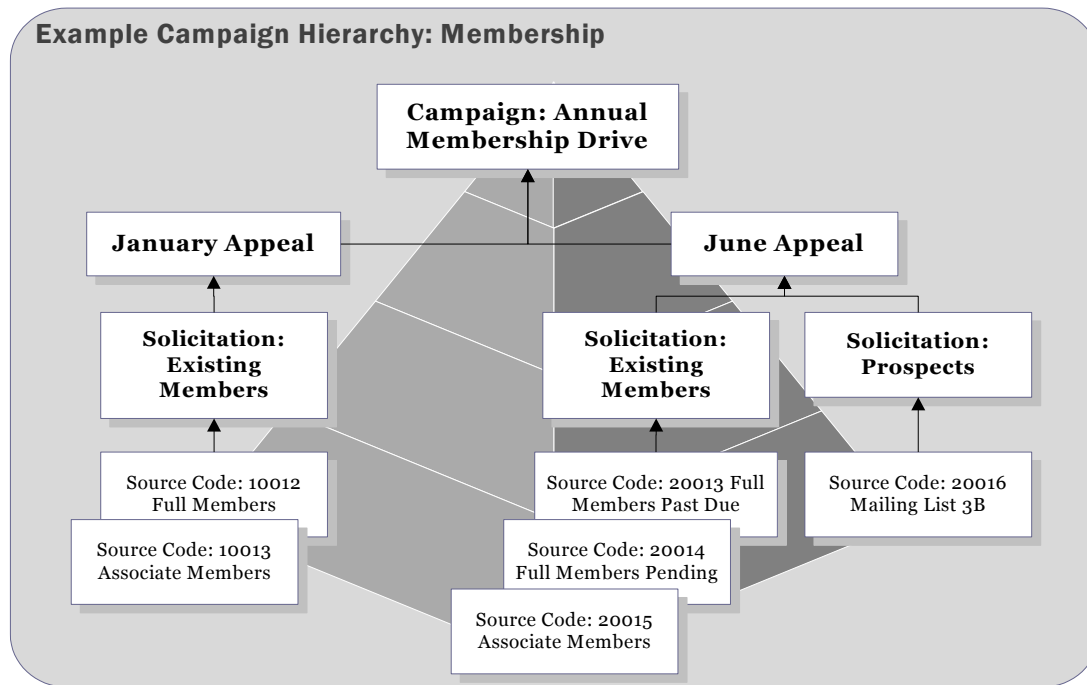
- Plan the campaign
- Define the campaign
- Define the appeals and solicitations in the campaign
- Specify communications efforts
- Monitor and measure performance

Campaign hierarchy

Campaign Management uses a hierarchical system to give you the flexibility to manage campaigns at the level of detail you require. The four levels are:

1. **Campaign** – A strategy to accomplish a single marketing goal. The campaign is the highest level of organization and measurement.
2. **Appeal** – Each major marketing effort of a campaign, usually associated with a drop date (the date the effort is sent out). Appeals are the building blocks of your campaign.
3. **Solicitation** – A communication effort sent to a targeted group. Solicitations can be sent as letters, email messages, phone calls, or other means.
4. **Source Codes** – Numbers assigned to each possible response for a specific solicitation (such as reply cards, phone calls, donations, or purchases). Your organization tracks responses with these numbers to measure the effectiveness of each solicitation. Source codes are the most granular level of measurement in a campaign.

The following diagram illustrates an example hierarchy for a basic member retention campaign.



Example membership campaign

Viewing campaigns

Campaign Management provides you the flexibility to view campaign information in a variety of ways. You can choose to:

- Filter campaigns by desired criteria
- Sort campaign lists by name or date
- Change the default sort order
- View the campaign structure to the level of detail you need

To filter campaigns by criteria

1. From **Marketing**, select **Campaign definition**.
By default, *iMIS* displays all **Active campaigns** for which you have security access privileges.
2. Choose a filter, if desired.
3. Select the campaign you want to view. The campaign overview displays.
The tabs along the top of the campaign display information about the campaign:
 - ☐ The **Summary** tab displays general information about the campaign.
 - ☐ The **Profile** tab displays general information for editing.
 - ☐ The **Appeals** tab displays the appeals associated with the campaign.
 - ☐ The **Security** tab displays access levels for defined security roles.

To sort the campaign list

1. From **Marketing**, select **Campaign definition**.

2. Click a column header to sort by that column.

Note: To change the default sort order when appeals are listed, edit the query named "(Default)" in **CampaignManagement/DefaultSystem/Queries/CampaignAppealsList/**. However, you cannot edit the query to change sort order if solicitations or source codes are displayed.

To view campaign details

1. From **Marketing**, select **Campaign management**.
2. Choose the level of detail to view:
 - ☐ **Show / Hide Appeals**
 - ☐ **Show / Hide Solicitations**
 - ☐ **Show / Hide Source Codes**

Campaign Structure page

The **Campaign Structure** page displays a clear picture of campaign structure in a single display.

Campaign Structure

Show / Hide Appeals					Show / Hide Solicitations					Show / Hide Source Codes				
Name					Total Revenue					Target Revenue				
Code					Segments					1st Resp				
[-]		FC_A1_Solicitation			0.00			0.00			0.00			
											4/16/2008			
		002												
		001												
[+]		FC_Solicitation 2			0.00			0.00			0.00			
[-]		FGT - Initial Mailing			0.00			0.00			0.00			

From **Marketing**, select **Campaign management**

Buttons across the top of the window (**Show / Hide Appeals**, **Show / Hide Solicitations**, **Show / Hide Source Codes**) enable you to collapse or expand the list to show the appeals, solicitations, and source codes for each campaign. **Select** links at the left of each row enable you to go directly to definition windows for solicitations and source codes.

Planning the campaign

By planning your campaign carefully, you and your staff can perform efficiently and effectively. The planning process includes:

1. Setting goals for the campaign
2. Defining campaign components and hierarchy
3. Defining the budget and cost tracking, if any
4. Identifying targets
5. Specifying marketing efforts
6. Defining campaign performance measurement

Your campaign might be an isolated, one-time-only campaign, or part of an annual or multiple-year strategic plan. Factor this into your planning.

Setting goals for the campaign

The goals and objectives for your campaign are unique to your organization. A goal is a simple statement that expresses what you want to do, such as:

- Increase the number of new donors
- Enroll new members
- Sell a new product
- Solicit advertisers for your periodicals
- Get a message out

An objective then states a measurable amount, such as:

- Increase new donor count by 5%
- Enroll 150 people
- Sell 2,000 units
- Increase ads placed by 15%
- Contact 15,000 prospects

You might set response rate goals, enrollment goals, sales goals, or budget goals. Knowing this information in advance can help you determine how best to set up your campaign.

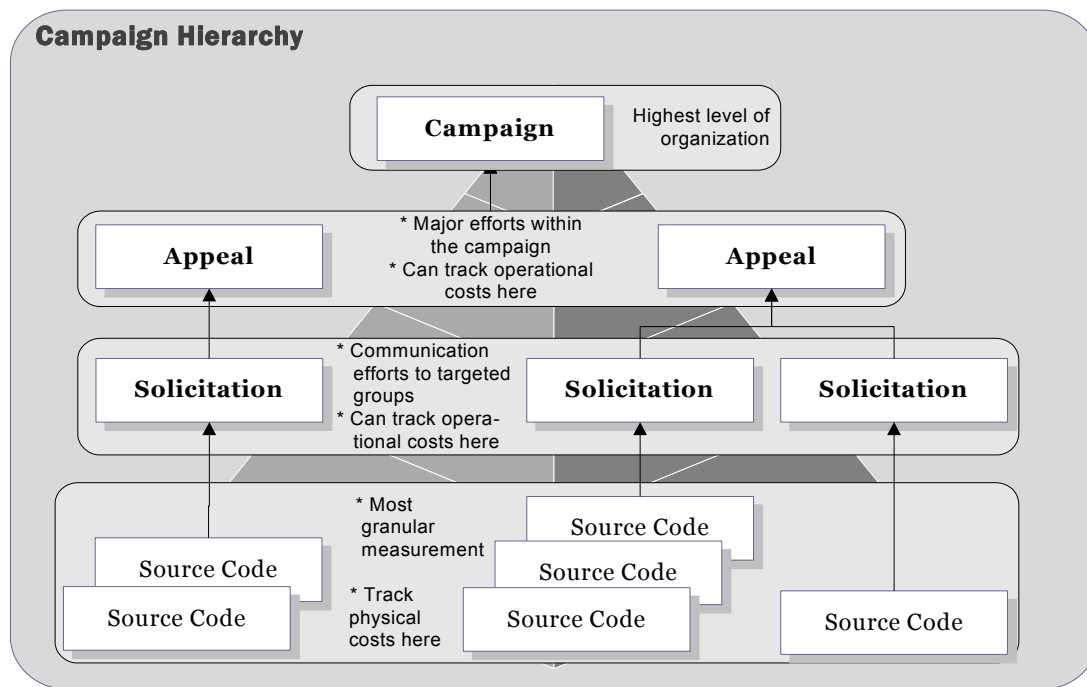
Defining campaign components and hierarchy

A campaign is an organized set of appeals that you create to accomplish your marketing goal. The campaign can consist of one or many appeals and solicitations.

Tips on defining campaign hierarchy

- Use appeals to split your campaign into major efforts.
- Define one or more solicitations for each appeal by target group, message, or delivery method.
- Assign one or more source codes to each solicitation to track responses.
- Create unique names at all levels: each campaign, each appeal within a campaign, each solicitation within an appeal, and each source code within a solicitation. The naming convention might be by department, type of campaign, year or quarter, or other meaningful methods.

It might be useful to sketch your campaign hierarchy in advance, for example:



Description of campaign hierarchy

Defining cost tracking data

In marketing campaigns, costs are tracked to calculate metrics such as Net Revenue, Cost per Thousand, Revenue per Thousand and Return on Investment. The cost of a campaign includes the overall operational costs of the campaign and the individual costs of each "package" that is sent.

Operational costs

Operational costs include any items that are applied to the entire marketing effort, such as:

- Paper
- Printing
- Letter shopping

You can track these costs at the appeal or source code level. In a basic campaign, you will probably define few source codes. In this case, it is effective to track operational costs at the source code level.

However, you may choose to track operational costs at the appeal level if you are managing a complex campaign with dozens or hundreds of source codes.

Package costs

Package costs include any items that are applied to the actual insert or package, such as:

- Postage
- Outer envelope
- Business reply envelope
- Business reply device
- Telemarketing costs

These costs are tracked at the source code level.

Identifying targets

Getting the right message to the right person at the right time is critical to the success of your campaign. With Marketing Suite, you can target prospects with simple or sophisticated tools. By precisely defining target markets, you can refine campaign messages with great accuracy. And you can measure the response rate to the messages for specific groups of people.

Think about which factors should be included and which should be excluded for each targeted group. You will use these factors to define the segment of prospects that you will be targeting for each solicitation.

Plan for the cases where customers 'opt-in' and 'opt-out' of different marketing activities. After the targeted message is delivered, the prospect will or will not respond. Marketing Suite gives you the power to define and manage processes for either case.

Using external lists

Some organizations use external lists to identify targets for their campaigns. External lists are brokered with individual list agreements that govern how the list can be used and for how long. Sometimes lists are given to the organization with all names and contact information attached. Other times, lists are used once and the organization only sees the contact information when the customer responds.

Planning communications efforts

Plan the efforts you will use to communicate with contacts or prospects. Each effort can be a combination of brochures, email messages, promotional goods, or whatever items you deem necessary. Define the contents and drop date for each package.

In addition, plan how you will communicate among the team and among your organization. Are there specific reports that will be useful for staff? Will you need to send email messages to the team upon completion of certain tasks?

Defining campaign performance

Measuring the success of your campaign helps you improve your next marketing effort. Each time the cycle repeats itself, you become more efficient at honing your message and delivering the right message to the right person at the right time. As a result, you are able to set ever higher goals for your organization.

iMIS provides you with analysis, workflow design, and communications tools to optimize the marketing cycle throughout your organization. Effective analysis allows you to target your time, energy, and budget to those pursuits which are most likely to be profitable.

The *iMIS* database stores all of your important transactional, historic, and demographic data, giving you the power to prioritize the data and present it to stakeholders in a meaningful manner.

Make sure you define how you will track data to determine performance. Some suggestions:

- Run counts and statistics on your database before you start the campaign to define your starting point.
- Specify your predicted response rate.
- Determine the metric you will use to show success.
- Synchronize responses regularly. This helps you stay up-to-date with metrics.

Defining marketing campaigns

After you plan the campaign, you are able to set up the campaign structure efficiently.

Business Goals

To define a campaign:

1. Enter basic information such as name, status, and start date.
2. Designate the general type of campaign. Use the defaults or custom types designed for your organization.
3. (optional) Enter predicted information, such as end date and predicted response rate.

If there is an existing campaign in place, you can create a new campaign quickly by copying it (cloning it) and editing it. See *To clone a campaign*.

If you delete a campaign, appeal, solicitation, or source code, all the lower levels of the hierarchy will also be deleted, regardless of status.

To create a campaign

1. Select **Marketing > Campaign definition**.
2. Click **Add a Campaign**.
3. Define the campaign:

- ☐ Enter a **Name** and **Campaign Code**.

- ☐ (optional) Enter a **Status (Active or Inactive)**.

If the status is changed from Active to Inactive, the status of all child entities is set to Inactive.

If the status is changed from Inactive to Active, the status of child entities is not affected.

The status of a child entity cannot be changed to Active if any parent entities have an Inactive status.

- ☐ Enter a campaign **Type**:

- **None**

- **Annual** – A campaign that occurs every year

- **Designated** – Funds generated by the campaign that are committed to a specific entity

- ☐ (optional) Enter a **Start Date** and an **End Date**.

- ☐ (optional) Enter a **Predicted Response Rate** (the estimated percentage of contacts that will respond to the appeal) and the **Last Response Date**.

- ☐ (optional) Enter a **Description**.

4. Click **Save**.

To clone a campaign

A cloned campaign is an exact duplicate of the original campaign with the following exceptions:

- The **Name** and **Campaign Code** are different.
- The **Created Date** equals the copy date.
- The **Created By** field equals the user who copied the campaign.
- The **Start Date**, **End Date**, and **Reminder Date** are adjusted automatically for the copied campaign.
- The copy has the same structure as the original campaign, including all appeals, solicitations, and source codes.
- All copied source codes contain the same inserts and messages as the original campaign.
- Source lists are not copied.
- If Campaign Management is configured to assign source codes automatically, all new source codes are regenerated automatically.

- If Campaign Management is configured to assign source codes manually, all new source codes are formatted as 'Copy of (original code).' If this code already exists, the code is copied until a unique code is found: 'Copy (sequence #) of (original code).'

To create a new campaign quickly, you can clone an existing one and edit it.

1. Select **Marketing > Campaign definition**.
2. Select a campaign.
3. Click **Save As**.
4. Enter the new campaign **Name**, **Campaign Code**, and **Type**.
5. Click **Save**.

To edit campaign security settings

Default campaign security settings are set up when the Marketing Suite is set up. However, if you are authorized, you can grant specific users and/or groups access to a campaign.

1. Select **Marketing > Campaign definition**.
2. Create a campaign.
3. Click the **Security** tab.
4. Select an **Access Mode**:
 - ☐ **Share (Everyone)** – Grants everyone full control.
 - ☐ **Private** – Grants full access to those assigned to the project.
 - ☐ **Advanced** – Enables the **Access Mode** drop-down list and allows you to edit the access list. You can select one of the listed access areas or select **Custom** to choose from a list of defined security roles.
5. Click **Save**.

Tracking costs for campaigns

To track costs at the Appeal level

1. Select **Marketing > Campaign management**.
2. Click **Show / Hide Appeals** and open an appeal.
3. (optional) Click the **Profile** tab and click the plus sign next to the **Overhead Cost** field.
4. Add an additional cost and click **Save**.

To track costs for an insert

1. Select **Marketing > Inserts**.
2. Select an insert.
3. Click the browse icon next to **Total**.
4. Enter a value in the **Cost Code** and a cost per piece in the **Amount**.

- Click **add**.

The screenshot shows a window titled "Cost Editor" with a tab labeled "> Costs". Inside, there is a table with two columns: "Cost Code" and "Amount". The table contains two rows of data: "VIP ticket, published value" with an amount of "250.00" and "Brochure cost per piece" with an amount of "7.02". Each row has a "remove" link to its right. Above the table, there are input fields for "Cost Code" and "Amount", followed by an "add" link. At the bottom of the window are "OK" and "Cancel" buttons.

Cost Code	Amount	
<input type="text"/>	<input type="text"/>	add
VIP ticket, published value	250.00	remove
Brochure cost per piece	7.02	remove

OK Cancel

- Click **OK** to save the values.

Confirm that the **Total** on the Insert window now shows the sum of the values entered on the **Costs** pop-up.

The screenshot shows a window titled "> Insert: Fall Campaign Insert" with three tabs: "Summary", "Definition", and "Processes". The "Summary" tab is active. It displays the following information: "Name" is "Fall Campaign Insert", "Description" is "Consists of: brochure, ticket to VIP reception", "Total" is "257.02" with a green ellipsis button, "Status" is "Available" with a dropdown arrow, "Insert Type" is "Enclosure" with a dropdown arrow, and "Output Process" is an empty field with a green ellipsis button and a green 'X' button.

Summary Definition Processes

Name: Fall Campaign Insert

Description: Consists of: brochure, ticket to VIP reception

Total: 257.02 ...

Status: Available ▾

Insert Type: Enclosure ▾

Output Process: ... X

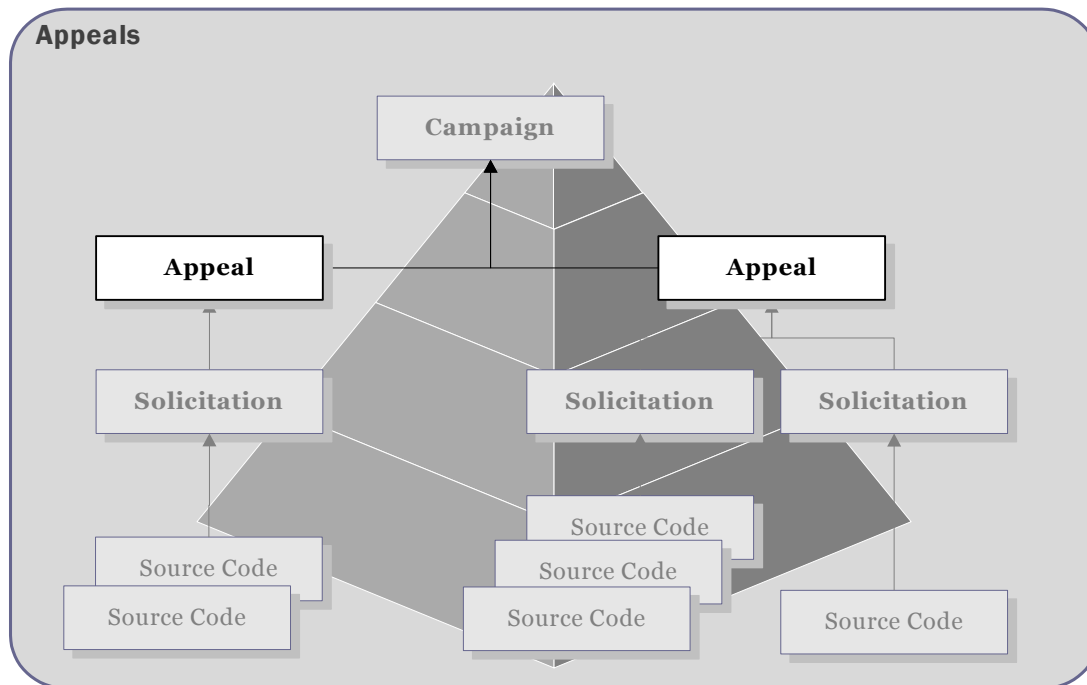
Sum of inserts

Tips

- Operational costs should be tracked at the Appeal or Source Code. The choice of tracking overhead costs at the Appeal or Source Code level is made in **Campaign Management > Set Up Module**.
- Package costs include any items that are applied to the actual insert or package: Those are tracked with the insert costs.
- Overhead Costs refer to any cost that is applied to the mailing or marketing effort as a whole. These costs tend to be difficult to break down on an item by item or cost per piece basis. You want to be able to track the costs against the appeal as a whole rather than trying to break out the costs against different source codes. This is especially true when you have multiple source codes within a marketing effort.
- Some costs apply only to a particular Source Code or part of a marketing effort, such as list rental costs or the difference between different packages sent. Even if you choose to track overhead costs at the Appeal level in your **Campaign Management > System Setup** options, you still have the option to be able track those additional costs. They are tracked as part of the package attached to the source code.

Defining campaign appeals

The appeal level is the anchor that binds the different elements of a marketing campaign.



Appeal level in campaign hierarchy

An appeal is the level of a campaign where you:

- Link specific products to the campaign
- Assign drop dates for media and other efforts
- Track costs, if desired

Important prerequisites to defining appeals

- You must have a campaign set up before you can add an appeal.
- Make sure that all products are created before you link them to an appeal. The purchase of these products will be tracked to help you measure the campaign's success.

Business goals

To define appeals for your campaign, you will:

1. Link specific products to the campaign. Your campaign might include physical products such as apparel, books, and documents or non-physical products such as event functions, gifts, and pledges.
 - Set up the products in the appropriate area before assigning them to the campaign.
 - Fundraising events: **Events > Define an event**
 - Gifts and pledges: **Fundraising > Set up Tables > Appeals** or **Distributions and premiums**
 - Physical products: **Orders > Manage inventory > Manage products**
 - Add the products to the appeal(s) in the campaign.
 - (optional) Set up minimum required gift amount to receive each product.

2. Assign drop dates.

The definition of drop date depends on the media involved:

- ☐ Direct mail – Date the post office starts to deliver the mailing
- ☐ Telemarketing – Date the calls begin
- ☐ Media spots (TV, radio, webcast) – Date of airing
- ☐ Newsletters – Date of mailing, by issue
- ☐ Online campaigns – Date the email messages are sent

Drop dates for other efforts can include:

- ☐ Mailing list generation
- ☐ Creative concepts/artwork complete
- ☐ Response management process set up

3. Track costs (optional).

If your organization tracks operational costs at the appeal level, you will need to enter cost information when you set up the appeal.

Next step

You will define solicitations as the different messages or groups of responses.

To create an appeal

1. Select **Marketing > Campaign definition**.

2. Select the appropriate campaign.

3. Click the **Appeals** tab.

4. Click **Add an Appeal**.

5. Define the appeal:

- ☐ Enter a **Name**.
- ☐ Select a **Status (Active or Inactive)**.
 - If the status is changed from Active to Inactive, the status of all child entities is set to Inactive.
 - If the status is changed from Inactive to Active, the status of child entities is not affected.
 - The status of a child entity cannot be changed to Active if any parent entities have an Inactive status.
- ☐ (optional) Enter an **Overhead Cost**, or click the plus icon to add multiple costs.
- ☐ (optional) Enter a **Start Date** and an **End Date**.
- ☐ (optional) Enter a response rate next to **Predicted Response Rate** (the estimated percentage of contacts that will respond to the appeal) and the **Last Response Date**.
- ☐ (optional) Enter a dollar amount for a **Target Revenue** value.
- ☐ (optional) Enter a **Description**.

6. Click **Save**.

The system displays the status on the **Summary** tab. Click on the link for more details.

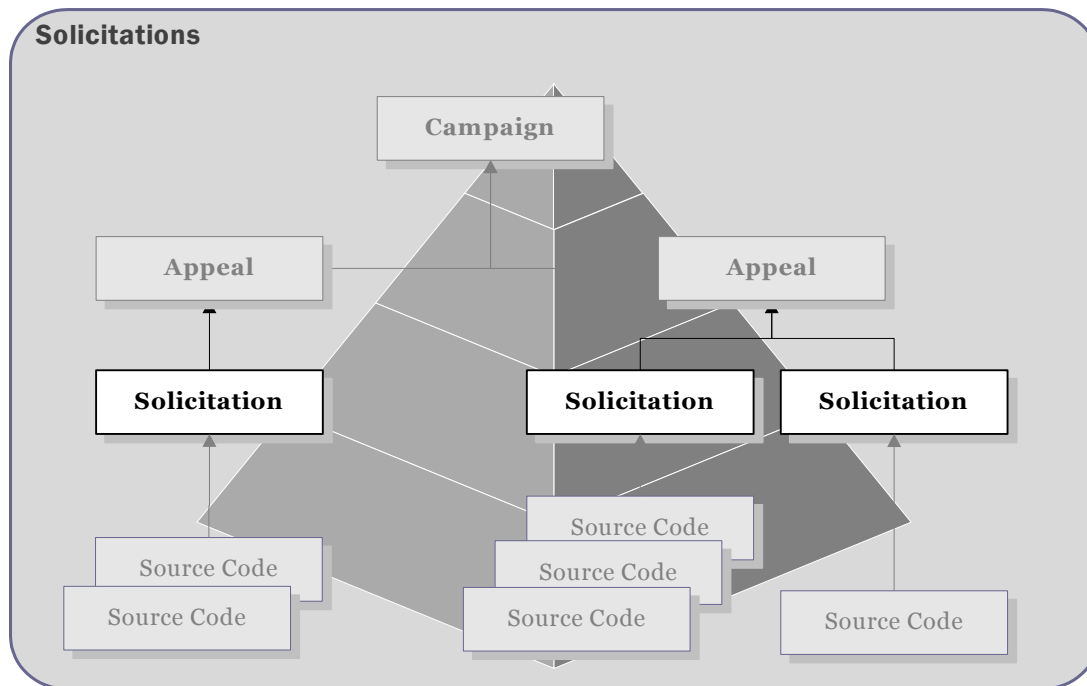
To assign a product to an appeal

1. Open a campaign.
2. Click the **Appeals** tab and select an appeal.
3. Click the **Products** tab.
4. **Select a Query** to view:
 - ☐ **All Products**
 - ☐ **Products By Code**
5. Select the desired products.
The added products display in the list of **Selected Products**.
6. Click **Save**.

Note: When you delete a product after it has been assigned to an appeal, the **Products** tab displays only the product code of the deleted product.

Defining solicitations

A solicitation is an organizing function that allows you to track responses by targeted groups. The solicitation is a series of source codes that requests a response from contacts and prospects (such as a reply, donation, or purchase). Using source codes, you create solicitations to target a specific marketing appeal for different groups of contacts and prospects. Solicitations can be in the form of letters, phone calls, personal conversations, or other methods of contact.



Solicitation level in campaign hierarchy

Solicitations can be:

- **Message-based** – The message is divided into different letter contents or package concepts. For example, if a mailing has an inexpensive package that will be sent to contacts who are least likely to respond, you can set up one solicitation for the less expensive package and a separate one for the more expensive package.
- **External group-based** – Different messages are sent to targeted groups of contacts.
- **Internal group-based** – Different messages are sent by different groups within your organization.

Organizations with multiple source codes within their organization probably need to measure responses in groups of source codes as well as at the source code level itself. See *Setting up complex campaigns*.

To create a solicitation

Before you begin

You must define one or more appeals before you define solicitations.

1. Select **Marketing > Campaign management**.
2. Select a campaign and then select an appeal.
3. Click the **Solicitations** tab.
4. Click **Add a Solicitation**.
5. Define the solicitation:
 - Enter a **Name**.
 - Select a **Status (Active or Inactive)**.
 - If the status is changed from Active to Inactive, the status of all child entities is set to Inactive.
 - If the status is changed from Inactive to Active, the status of child entities is not affected.
 - The status of a child entity cannot be changed to Active if any parent entities have an Inactive status.
6. (optional) Enter a **Start Date** and an **End Date**.
7. (optional) Enter a **Display Predicted Response Rate** (the estimated percentage of contacts that will respond to the appeal), **Description**, **Reminder Date**, and **Last Response Date**.
8. Click **Save**.

The system displays the status on the **Summary** tab. Click on the link for more details.

Tips

- Combine multiple source codes and list sources into a single solicitation.
- Use consistent naming conventions when creating solicitations.

Specifying communication efforts

Business goals

To define a communications effort for a campaign, you will:

1. Define source codes.
2. Create inserts.
3. Create or select target groups (source list).
4. Select a source list (who is selected to receive the message) and an insert (what will be sent) for each source code.

5. Generate output.

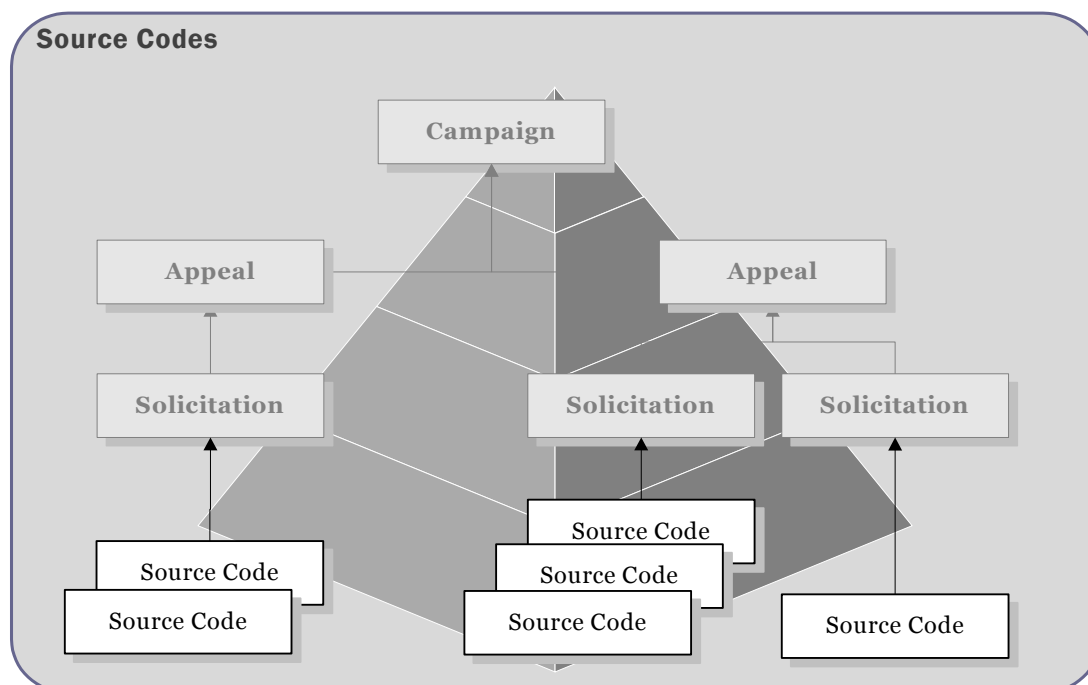
Defining source codes

Source codes are the most granular level of measurement in Campaign Management. These codes are used to identify messages you send out and track the responses to these messages. Source codes are linked to reply devices such as postcards, website links, donations, and purchases.

Use sources codes to:

- Tag the marketing message for each targeted group and to track the responses.
- Use questions such as "How did you hear about us?" to identify the message or call to action that prompted the response.
- Set up codes for bounce-backs and responses that cannot be linked to a specific message.

For a basic campaign you might define only a few (or even one) source code.



Source code level in campaign hierarchy

There are three general kinds of source codes:

- Codes assigned to outgoing marketing efforts to track the incoming responses to the effort. Sometimes a contact receives more than one solicitation from your organization in a certain timeframe.
- Generic codes that are assigned to ongoing passive ways in which a customer can support your organization, such as web transactions, word-of-mouth, or calls to action.
- Codes that are assigned to capture responses when the actual source code is not known.

Important prerequisites for defining source codes

Before you can define source codes:

- Define one or more solicitations.
- Set up source lists.

- Create an insert for the source code.

Tips for defining a source code

- Use consistent naming conventions when creating source codes. Your administrator can set up automatically generated source codes that follow your organization's standards.
- To ensure accurate response data, do not edit a source code after the responses are processed.

To create a source code

1. Open a campaign, appeal, and solicitation.
2. Click the **Source Codes** tab.
3. Click **Add a Source Code**.
4. Define the source code:
 - Enter a **Code** (if not automatically generated).
 - Select the **Source Code Status** (**Active** or **Inactive**).
 - (optional) Enter a **Description**.
 - Select the **List Member Type**:
 - **Contact** – Queries contain the NetContact business object.
 - **Prospect** – Queries contain the Prospect business object.
 - (optional) Enter the **Predicted Response Rate**, **Last Response Date**, and **Last Drop Date**.
 - (optional) Select the **Source Code Type**:
 - **RunOnce** – The source code will be used only once.
 - **RunMany** – The source code will be used more than once.
 - **ExternalList** – The source list is an external file. Enter the **External File Name** and **External List Count**.
5. Click **Save**.

Defining inserts

Inserts are the physical items you send to contacts and prospects, such as letters, pre-printed collateral, and envelopes. After you create an insert, you can reuse it in other campaigns.

Typically, a source code is linked to each insert item. Multiple inserts (such as letter, brochure and envelope) are combined into a single package for delivery. All responses to the solicitation are then tracked by the source code. This is a useful way to perform market testing because you can choose the most effective creative package or target a test group to receive the package.

In addition, you can track the cost of each insert to determine the return on investment and to monitor budget amounts.

Output processes

To further customize an insert, you can assign queries and output processes that generate customized letters, email messages, faxes, labels, rosters, and physical file formats in a specific order.

To create an insert

Before you begin

Make sure all applicable queries and output processes are set up.

1. Select **Marketing > Inserts**.

2. Click **Add an Insert**.
3. Define the insert:
 - ☐ Enter a **Name**.
 - ☐ (optional) Enter a **Description**.
 - ☐ Click the Browse icon for **Total** cost information.
 - ☐ (optional) Select the **Status (Available or Unavailable)** and **Insert Type**:
 - ☐ **None**
 - ☐ **Brochure**
 - ☐ **Envelope**
 - ☐ **Form**
 - ☐ **Postage**
4. Browse to select an **Output Process**.
5. Click **Save**.

Tips

- Merges used for inserts must use either the Contact or the Prospect business object as a source.

Note: You can also create a new insert for a solicitation by clicking the **New Insert** button while viewing the solicitation.

Note: When output is generated from Campaign Management using a project process engine, the query and source code specified in the campaign automatically override the query and source code specified in the project process engine definition.

Selecting target groups

Use one or more source lists to identify a targeted group for your message. Basic campaigns typically use one or more of the following types of source lists:

- Lists from previous campaigns – Stagnant lists for repeat audiences. You could use lists of all contacts who were solicited in a previous campaign or only those who responded.
- Queries – Dynamic lists that can change with criteria that you specify. You can choose from queries that are set up in your system or you can create new ones.
- External lists – Purchased prospect lists from other businesses or organizations.

Complex campaigns often use Segmentation to compile lists of contacts. See *About Segmentation*.

To create a source list

Before you begin

- ☐ Make sure all applicable queries are defined.
 - ☐ Create all applicable segmentation jobs and definitions.
 - ☐ Create multiple source lists for use with single source codes.
1. Open the campaign.
 2. Select a source code.
 3. Click the **Source Lists** tab. (If the source code uses an external list, the **Source Lists** tab is not available.)

4. Under **Add Source List**, choose the **Select Type**:
 - ☐ **Segment Definition** – Select a segmentation job.
 - ☐ **Solicitation Response** – Select a campaign.
 - ☐ **Query** – Select a stored query.
5. Click **Save**.

Note: Throughout **Marketing**, NetContact is a required business object. Make sure that you include NetContact when you create source lists using queries.

Generating marketing output

Run output processes to generate customized letters, email messages, faxes, labels, rosters, and physical file formats in a specific order. Running the output process also calculates the non-responses for each appeal. The following output processes are available:

- MS Word merge – Print letters, acknowledgements, and other MS Word documents.
- Email merge – Send email messages to contacts.
- Campaign list export – Generate a list of contacts for an external service or for mass email output.
- RFM definition – Rank records based on Recency, Frequency, and Monetary value.
- Project process outputs – Generate projects for further relationship building.

Important prerequisites for generating output

Before you run output processes:

- Make sure valid output process types are set up.
- We recommend you generate and check a test output to make sure the message and target group is correct.

Business goal

To run output processes, you will:

1. Select the type of output process for the insert.
2. Define the specific output process.
3. Generate output.
4. View the results.

To generate output

1. Open a campaign, appeal, and solicitation.
2. Click the **Source Codes** tab.
3. Select a source code or create a new one.
4. Click **Save**.
5. Click the **Inserts** tab.
6. Select an insert or create a new one.
7. Click **Save**.
8. Click the **Source Lists** tab.
9. Select a source list or create a new one.

10. Click **Save**.
11. Click **Generate Output**.

The system displays the status on the **Summary** tab. Click on the link for more details.

Note: If the output is generated at a level higher than source code, output can be generated only once. If the output is generated at the source code level, output can be generated repeatedly.

Monitoring and measuring performance

Measuring the success of your campaign helps you improve your next marketing effort. Each time the cycle repeats itself, you become more efficient at honing your message and delivering the right message to the right person at the right time. As a result, you are able to set ever higher goals for your organization, such as acquiring more members, logging more donations, selling more products, or getting your message to a larger audience.

Marketing Suite provides progress and performance feedback at many levels of the campaign. You can view a real-time summary of the campaign's performance, including:

- The progress of each solicitation, source codes that have been generated, and source codes that have been dropped
- The number and type of responses resulting from each solicitation
- The progress, response, and accumulated revenues/costs for each source code
- The actual revenues and costs compared to the target figures for each source code and appeal
- Performance information to guide future actions and campaigns

These powerful performance monitoring features are usually sufficiently rigorous for basic campaigns. For more complex campaigns, use RFM Analytics.

Tracking responses

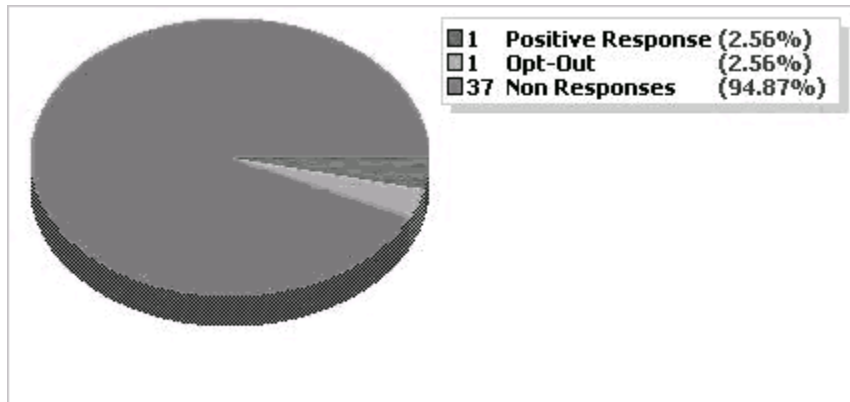
Campaign Management gives you the power to track different types of responses to a campaign. This allows your organization to:

- Maintain a history of all customer responses to marketing efforts and every message that was sent
- Define specific tasks that execute automatically when prospects respond or do not respond to solicitations
- Generate personalized emails, faxes, and letters based on user-defined settings

Responses to solicitations are captured automatically. All tracking areas are synchronized, upon command, to consolidate responses. This tracking information includes:

- Contacts associated with the source code
- Non-responses and opt-outs

- (optional) Financial transactions associated with the campaign (orders, events, gifts, pledges, billings)



Example display of responses to a solicitation

Tips for tracking responses

- If you plan to track product orders associated with the campaign, make sure all appropriate products are set up.

Business goals

To track the responses to your campaign, you will:

1. Enter orders and associate them with a source code.
2. Synchronize responses.
3. View the results file or the summary pie chart of each level of the campaign.
4. (optional) Use communications tools to generate messages automatically when a response is received.
5. (optional) Use Process Manager to kick off projects or processes associated with each type of response or target group.

Events responses

You can associate events with your campaign and track responses:

- Event responses are tracked through registration data, not through payment data.
- Registration for multiple event functions that have the same source code are counted as one response. Registrations for multiple event functions that have different source codes are counted as multiple responses.

Adding an event function to an event registration is counted as a response and affects all revenue and response attributes, such as response dates, response amounts, and response count.

Removing an event function from an event registration affects total revenue but does not affect other revenue and response attributes such as response dates, response amounts, and response count. Removing an entire event registration decreases response count and revenue.

Dues responses

You can associate payments with your campaign and track responses:

- Payments for multiple products that have the same source code are counted as one response. Payments for multiple products that have different source codes are counted as multiple responses.

- Cancelling a billing fundraising item decrements total revenue, but does not affect other campaign statistics.

If you change the source code for a payment after running response synchronization, the response is not updated.

Synchronizing campaign responses

Each time you synchronize responses, only those product sales that have occurred since the last time the process was run are processed.

If you synchronize responses for an inactive campaign, no responses are generated. If you change a campaign status to **Active** and then synchronize responses, only those responses entered after activating the campaign are recorded. *iMIS* ignores the responses entered when the campaign was inactive.

To synchronize responses

1. From **Marketing**, select **Campaign definition**.
2. Click **Sync. Responses**.

A status message displays noting that the responses are being synchronized.

3. Go to **System Setup > Workflow Monitor** (on desktop) or **Tools > Workflow** (on your *iMIS*-enabled website) to observe the synchronization's status.

Caution! Do not edit a campaign source code after processing responses for the source code.

Creating projects from Campaign Management

You can easily create projects that correspond to your campaign and manage them in **Process Mgr**. Create these projects by defining, editing, or selecting the following information for the new projects:

- A query
- A project process output
- A source code

To create projects from a campaign

1. From **Marketing**, select **Inserts**.
2. Select an insert that already contains a project output process, or create a new one.
3. Click the browse icon to select the **Output Process** or click the **Processes** tab and select **New** to define a new process.
4. For a new process, click the **Sources** tab and browse for the **Source Data Query** and **Template Name**. Click **Save**.
5. Click **OK**.
6. Click **Generate Output**.

The system displays the status on the **Summary** tab. Click on the link for more details.

Note: When output is generated from Campaign Management using a project process output, the query and source code specified in the campaign automatically override the query and source code specified in the project process output definition.

Acting on responses

You can easily set up your campaign so that specific tasks are generated when a prospect responds or fails to respond to a solicitation. This helps you to:

- Acknowledge positive responses
- Send a cross-promotional solicitation to positive responders
- Initiate reminders to prospects who do not respond to initial solicitations
- Make sure that prospects who opt out of the campaign do not receive further solicitations

To create a response stage

You can define response stages in the source code so a contact moves through campaign stages (solicitations) as they respond to solicitations.

1. Open the source code.
2. Click the **Source Lists** tab.
3. In the Add Source List area, **Select Type of Solicitation Response**.
4. Select a campaign.
5. For each campaign response stage:
 - ☐ Select an **Appeal**.
 - ☐ Select a **Solicitation**.
 - ☐ Select a **Source Code**.
 - ☐ Select a **Comparison** value (**Equal** or **Not Equal**).
 - ☐ Select a response **State**:
 - **Solicited** – Contact has been solicited but has not responded.
 - **SolicitedResponse** – Contact has responded to a solicitation.
 - **UnsolicitedResponse** – Contact has responded but was never solicited.
 - **OptOut** – Contact has opted out of the solicitation and will be excluded from any future lists for this campaign, appeal, and source code.

Note: If a source code is provided with the response, the system assumes the contact was solicited.

- ☐ Click **add**.
- ☐ Select a **Global Operator** that applies to all solicitation state expressions (**AND** or **OR**).

6. Click **Save**.

The solicitation response displays in the **Source Lists**.

Note: You can choose to automatically assign source codes to responses in **Set up campaign module**.

To view responses

Before you begin

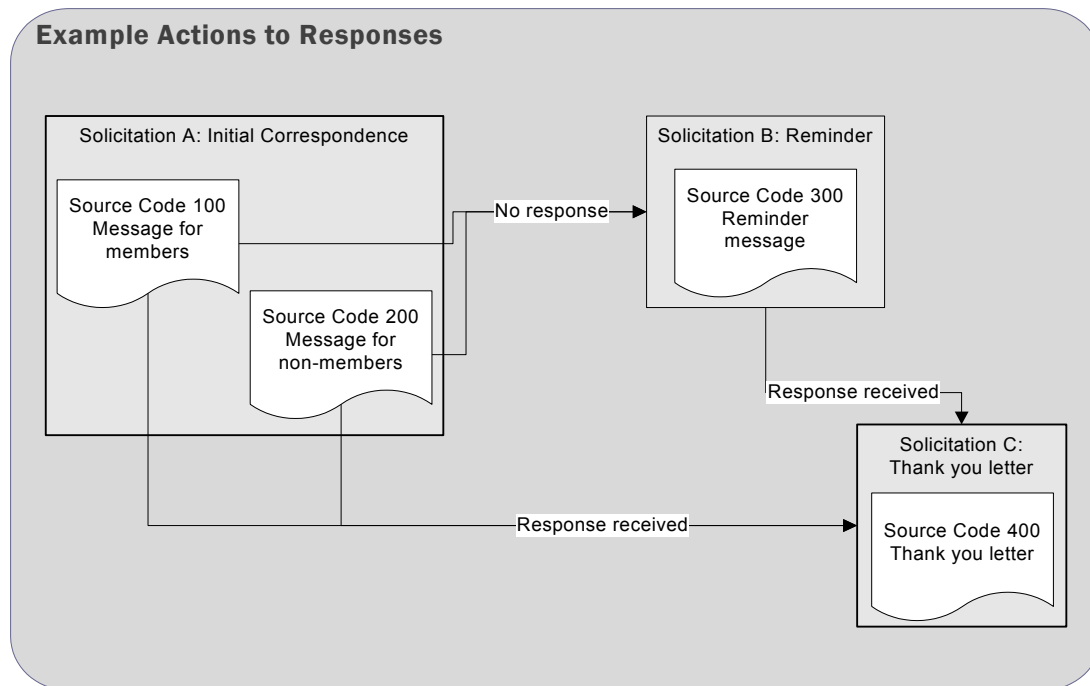
Before you can view responses, you must:

- ☐ Create response stages
 - ☐ Synchronize the responses
1. Select **Marketing > Record responses**.
 2. Find the desired contact.

The system displays a list of responses for that contact by source code, appeal, and campaign.

Example: Response actions

The following campaign is defined so that a response to Solicitation A (initial correspondence) automatically moves the contact into Solicitation C (thank you letter). After a period of time (or a non-response to Solicitation A), the contact automatically moves into Solicitation B (reminder). A response to Solicitation B automatically moves the contact into Solicitation C.



Response process example

Basic campaign example: Professional conference

The following is an example of a basic campaign for a professional conference. This example follows the business goals for Campaign Management:

1. Plan the campaign.
2. Define the campaign.
3. Define the appeals and solicitations for the campaign.
4. Specify communication efforts.
5. Tracking responses
6. Monitor and measure performance.

Planning the campaign

The ABBA professional society hosts a major conference each year. The goal of the Annual Conference Campaign is to recruit 20% more attendees than last year.

Overhead costs are tracked at the appeal level. For the first appeal, the first two solicitations have different creative concepts to test effectiveness. The more successful concept will be used for the brochure and conference signage. One source code is assigned to each solicitation.

The hierarchy for this appeal is simple:

Campaign = Annual Conference

Appeal = Save the Date postcard

Solicitations = Creative A to Segment 1 (source code 000134), Creative B to Segment 2 (source code 000135)

First Mailing

The first mailing is a Save the Date post card. The goal is to get people to put the conference date on their calendar and to plan to attend. Because there is not a true call to action associated with this mailing, it is an ideal situation for testing a creative concept. There will be inquiries from:

- People who want to register right away
- Companies looking for sponsorship opportunities
- Companies looking for exhibitor opportunities

These inquiries indicate the more successful concept to be used throughout the campaign.

Second Mailing

After determining the more successful concept, ABBA incorporates the concept into the full conference brochure. The brochure contains sections on schedule, tracks, speakers, and entertainment options and is the most important mailing in the campaign.

The basic structure for this appeal is:

Campaign	Appeal	Solicitation	Source Codes
Annual Conference	Full Conference Brochure	Past Attendees	000234: Attended last year 000235: Attended year before 000236: Attended earlier
		People who have never attended	000334: Members 000335: Non-members

So far, ABBA has a sound plan:

- The appeals help them separate out invoices for each mailing to determine the true return on investment for each one.
- Solicitations break down the mailings into logical and broad groups of records with varying estimated response rates. It is likely there will be a higher response rate from past attendees than from people who have never attended.
- Source codes further break down the groups for customized mailings and different estimated response rates. The source codes can be seen as declining levels of expected positive responses.

Defining the campaign

Campaign definition is straightforward:

- Name = Annual Conference
- Status = Active
- Start date = today's date
- Campaign type = Event
- Predicted end date = today's date + three months

Defining the appeals

Define each appeal:

- Name = Save the date postcard
 - Status = Active
 - Start Date = today's date
 - End Date = today's date + three weeks
 - Predicted Response Rate = 10%
- Name = Conference brochure
 - Status = Active
 - Start Date = today's date + 6 weeks
 - End Date = today's date + 3 months
 - Predicted Response Rate = 30%

Defining the solicitations

Define each solicitation similarly to the first one:

- Name = Conference Save the Date Postcard Creative A
- Status = Active
- Start Date = today's date + 1 week
- End Date = today's date + 1 month
- Predicted Response Rate = 5%

Specifying communication efforts

This is the point at which the target groups, inserts, source codes, and packages are defined.

Select target groups

ABBA will use the same lists as last year: Segment 1 and Segment 2.

Create inserts

Create inserts for each mailing similarly to the first one:

- Name = Annual Conference Template_NS_Segment1
- Status = Active
- Insert Type = None

Define source codes

The inserts will be attached to a source code and combined as packages for each mailing.

Set up source codes similarly to the first one:

- Code = 000134
- Description = Segment 1
- Status = Active
- Predicted Response Rate = 7.5%
- Target Revenue = \$7500 (from attendees who want to register immediately)
- Source Code Type = Run Once

- List Member Type = Contact
- List Type = Segment Definition
- Add Segment 1
- Attach insert to a package: Add Conference Save the Date Postcard Creative A.

Generate output

Generate output for the first appeal to produce labels for the postcards and to ensure that responses will be tracked:

- Open the appeal and generate output.
- Output process = Postcard labels (from list of available choices)

Repeat for the second appeal when appropriate.

Example display

This example campaign will display similarly to:

Name	Total Revenue	Target Revenue	Overhead Cost	ROI %	Start Date	End Date	Status
Code	Segments		1st Resp	Last Drop	Type	Member Type	Status
<input type="checkbox"/> Annual conference - Full Conference brochure							
<input checked="" type="checkbox"/> select Past attendees	0.00	0.00	0.00	0	1/3/2009	3/31/2009	Active
<input checked="" type="checkbox"/> select People who have never attended	0.00	0.00	0.00	0	1/3/2009	3/31/2009	Active
<input type="checkbox"/> Annual conference - Save the Date postcard							
<input type="checkbox"/> select Creative B with green to Segment 2	0.00	0.00	0.00	0	1/3/2009	2/21/2009	Active
select 000135					RunOnce	Contact	Active
<input checked="" type="checkbox"/> select Creative A with blue to Segment 1	0.00	0.00	0.00	0	1/3/2009	2/21/2009	Active
select 000134					RunOnce	Contact	Active

Example: Professional conference display

Getting Started: Complex Campaigns

Complex campaigns for the purposes of this document:

- Contain many appeals and related solicitations
- Use many source codes
- Often build on the targeting and analytical data generated by Segmentation and RFM Analytics

Setting up complex campaigns

To set up a complex campaign, follow this process for best efficiency.

In Segmentation

1. Write the universe query that defines who receives the marketing effort.
2. Create the segmentation job or optionally, attach the universe query to the job.
3. Write the segment queries that will separate your universe into smaller target groups, such as by membership category or by transaction types or by event.

4. Create the segment(s) by attaching segment queries to each segment.
5. Populate the segments.

In Campaigns

1. Create the insert(s).
2. Set up the campaign, appeals, solicitations and source codes (one source code per segment).
3. Attach the segments and inserts to the source codes.
4. Generate output.

Tips for setting up complex campaigns

- Plan first. Building a spreadsheet of the basic structure early makes it easier to test and train users.
- Think about data criteria. Most marketing efforts use inclusion and exclusion criteria to generate their list within their system. In fundraising organizations, this is particularly so. How are you going to determine what that criteria is and how are you going to manage the information as customers 'opt-in' and 'opt-out' of different marketing activities?
- Think end-to-end marketing. Many marketing efforts are not isolated campaigns but are part of a broader, cyclical plan. Be prepared for that and factor it into your planning.
- You can track budgets at the appeal level or the source code level. This tracking allows you to define overhead costs and the cost of individual inserts. The method you use to track budgets also determines how costs are entered, recorded, and calculated within the Campaign Management module.
 - If your organization does not use complex segmentation, set the budget level to **Appeal**.
 - If your organization uses complex segmentation, especially with insert testing, set the budget level to **Source Code**.
- Decide whether you need a single source code or several:
 - Newsletters and similar mailings are rarely personalized beyond the mailing label attached to the piece. For this reason, although a template segmentation job is probably going to be used, a single source code will be assigned for each issue. This may be printed on the newsletter or mailing but it may not be. The issue number or cover article may be enough to be able to track the source code at the customer level.

In this case, multiple segments = a single source code.
 - Marketing efforts that are less informational and more "call-to-action oriented" (targeted marketing campaigns) require a high level of personalization. For these types of campaigns, each segment should be assigned a unique source code.

In this case, individual segments = distinct source codes.
 - If you want each RFM score to be a segment, assign a source code to each segment.

If your campaign has only one source code, you can:

- Add one or more inserts (including more than one of the same insert).
- Generate customized lists of contacts and prospects using any combination of multiple source lists.
- Create all applicable inserts, queries, and segmentation jobs before you create a source code.

About Segmentation

Use Segmentation with Campaign Management to group contacts and prospects into targeted audiences. With Segmentation, you can:

- Create targeted contact and prospect lists according to demographic and behavioral patterns or other include/exclude criteria.
- Split segments into multiple lists and prioritize the segments.
- Eliminate duplicates in lists.
- Perform controlled and repeatable list pulls.
- Create n-Select or random select segments for message or delivery testing.
- Get counts for communications collateral before production.
- Assign unique source codes to segments to effectively analyze an effort's success.
- Copy segmentation jobs and purge inactive jobs.
- Reuse query definitions for multiple campaigns.

Segmentation drives the criteria that will be used to select and segment those customers who will receive our marketing efforts. A segmentation job is a set of queries that are run in a specific order and result in the selection of the first occurrence of each matching record.

Segmentation data is prepared and run before it is attached to its source code and the final output is generated. This allows for data criteria testing, test or dummy selects, or to get counts before the final list is prepared. And, because the data can be purged and lists can be run again, you can continue to target your message.

Segmentation jobs have two levels of hierarchy:

- The job: the job can have a 'universe query' attached to it. It's not essential that a universe query be attached to a job.
- The segment: the segment definition also has a query associated with it. This query is called the 'population' query and contains the minute criteria we need to define who falls into which segment.

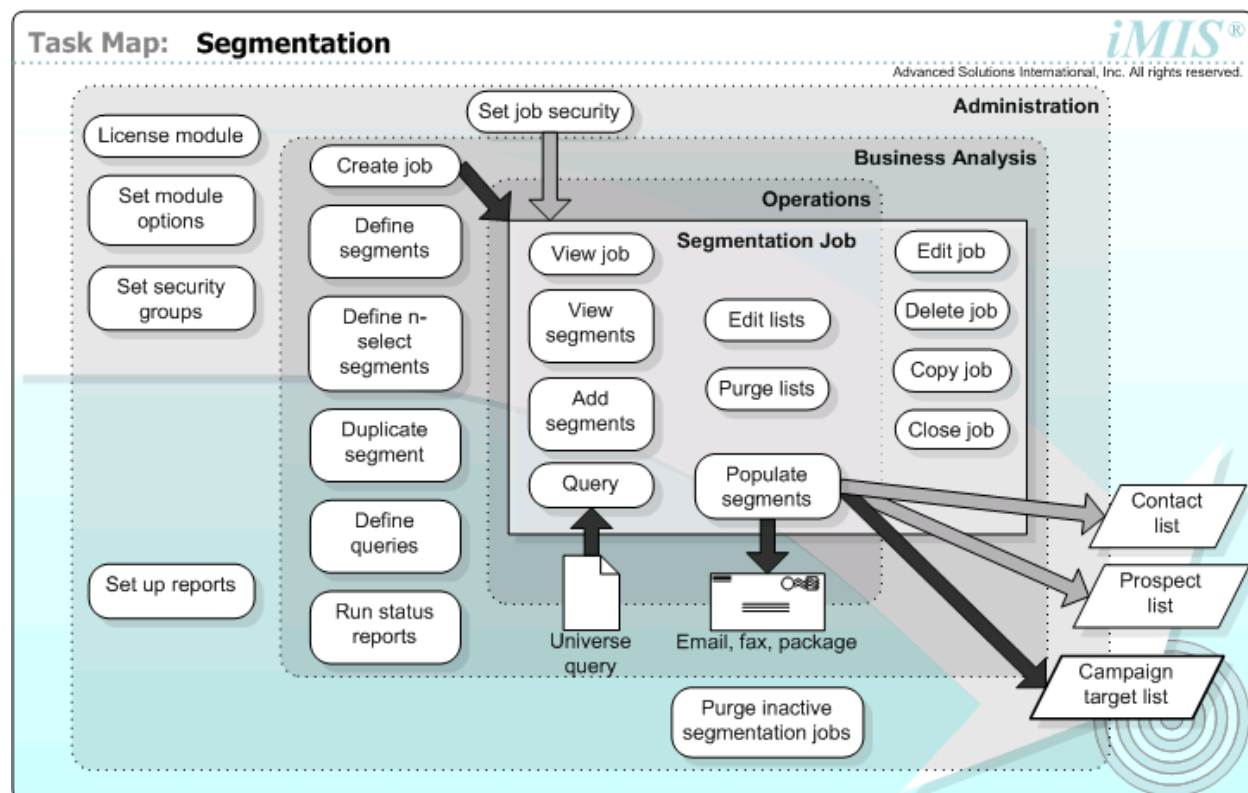
Business goals

The steps to create segmented lists are:

1. Create a segmentation job.
2. Add, split, and/or delete segments.
3. Populate the segments to create lists.

Task Map: Segmentation

This diagram maps out the core tasks in Segmentation by the approximate order they occur (top-left to bottom-right) and by the organizational area that usually performs them.



Task map: Segmentation

Viewing segmentation jobs

You can view all segmentation jobs or you can filter your view of segmentation jobs by creation date, creator, description, name, or by active jobs.

If you filter the segmentation jobs view by description, all segmentation jobs with matching description fields display.

If you filter the segmentation job view by creation date, you can view segmentation jobs created on a specified date or during a specified date range:

- To view segmentation jobs created on a specified date, enter the date.
- To view segmentation jobs created during a specified date range, enclose each date in double quotes and separate the dates with a comma (*for example*, "1/4/2008","1/8/2008" specifies jobs created January 4, 2008 through January 8, 2008, inclusive).

Creating a segmentation job

A segmentation job contains the job definition, security settings, and segment definitions used to generate contact or prospect lists.

There are two types of segmentation jobs:

- Contact jobs – All queries for a **Contact** segmentation job must contain the Contact business object as a source.

- Prospect jobs – All queries for a **Prospect** segmentation job must contain the Prospect business object as a source.

Note: When you set the type as Contact or Prospect, the system automatically defaults to the correct business object.

Each segment is assigned an execution order to make sure duplicates are not generated. What is often different from appeal to appeal is the exclusion criteria you apply.

Note: After selecting an additional source table, you must define a Custom relationship between the tables; in most cases, you can use the **ID** field for the join.

Universe queries

A "universe" query defines the entire population of contacts for a segmentation job. When a universe query is present, a contact must be a member of the universe query for the contact to be included in any of the segments within the segmentation job.

If a universe query is defined for the segmentation job, it must be included as a source for any segment-level queries. The system automatically populates this. Universe queries are required only when defining n-Select segments.

Note: When adding a pre-existing universe query, check the source to make sure that the Contact business object is one of the sources. If Contact is not a declared source, the query will fail.

n-Select segments

n-Select segments list contact/prospect records returned by a selection filter in a number (*n*) of segments, with an equal number of contacts or prospects in each segment.

To create n-Select segments, you must include a universe query in the segmentation job. The universe query can include the results of a previous segmentation job as a source.

Note: If you have defined n-Select segments for a segmentation job, you must create these segments before you can populate the lists.

To ensure that your n-Select segments are successfully populated, make sure you do not exceed the total number of records returned by the universe query when you define the n-Select segments. For example, if the query returns 500 records, you can define *n* number of segments, each consisting of *x* number of contacts or prospects per segment, as long as *n* times *x* is less than or equal to 500.

Exclusion segments

Exclusion segments are any segments in the segmentation job that are not linked to a source code. Since each record can only be retrieved once, creating an exclusion segment in the segmentation job results in any records retrieved by an exclusion segment not being retrieved by later segments. For example, if two appeals are being dropped in a short period of time, you may want to include one or more segments in one appeal but not in the other.

Exclusions are applied at the segment level, and they can appear anywhere within a list of included segments, with these exceptions:

- Universal exclusions (**No Mail Flag** or **Bad Address**) should be the first segments entered in the segmentation job.
- Include segments have a link to a defined source code and should be defined after any universal exclusion segments.

If you specify a number of random records to return for a segment, the resulting list may contain fewer than the specified number of records. The segments are first populated and then checked for duplicate contacts or prospects. If duplicates are found, they are removed, and the segments from which they were removed will contain fewer than the specified number of records.

To create a segmentation job

1. From **Marketing**, select **Segmentation**.
2. Select **Add a Job** and enter the job definition.
3. From the drop-down menu, select the **Type**.
4. (optional) Apply a filter (universe) query to the job. You can create a new query or use an existing query. These queries can be added later.
5. (optional) To define and create n-Select segments, click the **n-Select** tab. Enter the number of segments and the number of contacts per segment.
6. (optional) To modify the security settings for the job, click the **Security** tab.
7. (optional) To define explicit segments, click **Segments**:
 - ☐ Enter segment definitions.
 - ☐ Select an existing query or create a new query.
 - ☐ (optional) Select the number of random records to use to populate the segments.
 - ☐ (optional) Modify the **Priority**.
8. Select **Save**.

Note: Add or edit segments before closing the job.

Creating source codes based on segment definitions

Before you begin

- Create the source lists for which you want to create source codes.
- Create the segmentation job and add segments to the job.
- Generate output so that the lists are populated.

To automatically create source codes based on segment definitions

1. From **Marketing**, select **Campaign Management**.
2. Open a campaign and view the **Summary** tab.
3. Click **Create Source Codes from List**.
4. Create the source codes:
 - ☐ If you want to build source codes based on solicitation lists, click an available solicitation to add it to the **Current Solicitations** list and then click **Create Source Codes**.
 - ☐ If you want to build source codes based on segments, click the **Create from Segments** tab, and then click an available populated segmentation job to add it to the **Select Segmentation Definition** list. If you select Job Name, you automatically select all the segments in the job, or you can pick and choose among the segments by selecting just the segments from which you want to create source codes. Click **Create Source Codes**.
5. To view the automatically created source codes, click the **Source Codes** tab on the campaign.

Reusing and copying segmentation jobs

By reusing segmentation jobs or copying and editing them, you can work efficiently. After a targeted list pull, you can save the job and refresh the list to run it again. As the campaign progresses, you can copy the job, rename it, and adjust the segments to be included.

Consider creating segmentation templates that can be copied and reused with minimal manipulation. If you build a template with the core of the segmentation requirements, the user can copy it and modify it at any time.

Tips for copying a segmentation job

- All segments in a segmentation job are copied when the segmentation job is copied. However, any contacts or prospects contained in a segment are not copied. You must populate the segments in the copied segmentation job to generate contacts or prospects to fill the segments.
- When you copy an existing segmentation job, for convenience the new segmentation job is named "Copy of OriginalJobName" (for example, "Copy of Contacts"). Rename the copied segmentation job and edit it as desired.
- If any segment editor pages from the original job were open when the job was copied, these windows will still reference the original job. To edit the segments in the copied segmentation job, you must select the **Segments** tab after copying the segmentation job and open the segments individually.

To copy a segmentation job

1. From **Marketing**, select **Segmentation**.
2. Open an existing job. Click **Save As** and rename it.
3. Open the new job.
4. Edit, add, and/or remove segments.
5. Adjust query filters.
6. Click **Populate Segments**.

Example: Creating a segmentation job

In this example, we want to mail catalogues to individuals who have not yet registered for conference and exclude those who have registered.

Exclude: Already Registered for the Conference

Include:

- Last attended 2008
- Last attended 2007
- Last attended in 2006 or earlier
- Never attended - Members
- Never attended - Non-members

Execution order is important. We want to first exclude those who have registered, and then populate the list with contacts in each segment who have not registered.

This example displays as:

Name	Created Date	Execution Order
select Exclude current registrants	1/2/2009	1 delete
select Last attended 2008	1/2/2009	2 delete
select Last attended 2007	1/2/2009	3 delete
select Last attended 2006 or earlier	1/2/2009	4 delete
select Active members	1/2/2009	5 delete
select Non-members	1/2/2009	6 delete

Example: Segmentation job

Managing segments in a job

Viewing segments

You can view all segments or filter your view of segments by creation date, description, or name.

To view segments

1. From **Marketing**, select **Segmentation**.
2. Open the segmentation job.
3. Select the **Segments** tab.
4. (optional) Select a filter (by creation date, description, or name) if needed. By default, all segments display.
5. Select the segment to view. The segment definition displays.
6. If the segments have been populated, select the **Results** tab to view the segment contents.

Adding and editing segments

A segment definition is used to generate contacts or prospects based on demographic behaviors (for example, gender, location, age) and/or transactional behaviors (for example, attending events, purchasing books, or making donations).

Note: After selecting an additional source table, you must define a Custom relationship between the tables; in most cases, you can use the **ID** field for the join.

Note: Add or edit segments before closing the job.

To add or edit a segment

1. From **Marketing**, select **Segmentation**.
2. Open the segmentation job.

3. Select the **Segments** tab and add a new segment.
4. Enter the segment definition.
5. Using the **Population** buttons, select an existing query or create a new query.
6. (optional) Select the number of random records to use to populate the segments.
7. (optional) Modify the **Priority**.
8. Click **Save**.

Copying segments

If there is an existing segment definition that is similar to the segment definition you need to create, you can duplicate the existing segment definition and modify it as needed. The new (duplicated) segment appears in the same segmentation job as the original.

If you add or insert a new segment in an existing segment, you must manually change the order numbers of all the segments within the segmentation job.

To duplicate a segment

1. From **Marketing**, select **Segmentation**.
2. Open the segmentation job.
3. Select the **Segments** tab.
4. (optional) Select a filter (by creation date, description, or name). By default, all segments display.
5. Select the segment to view.

The segment definition displays. The **Duplicate Segment** button does not display until the segment definition has been saved and the segment has been reopened in the **Segment Definition Editor** window. The **Duplicate Segment** button does not display when a segment definition is initially created and saved.

If you do not see the **Duplicate Segment** button enabled when you open an existing segment definition, either you lack permissions to edit the definition or the lists have not been generated for the segmentation job.

6. Click **Duplicate Segment**.

The **Segment Definition Editor** page closes and the new (duplicated) segment displays in the segments list directly above the segment that was duplicated. Both segments will have the same name.

7. Open the new (duplicated) segment.
8. Edit the segment definition.
9. Click **Save**.

Splitting segments

You can split a segment into multiple segments (A/B split) by creating additional segments that use the same query.

1. Define the segments in sequence (using the same query).
2. Run the query to determine the segmentation count.
3. After deciding how many records should be retrieved for each segment, retrieve each segment and specify the count for each segment.

Note: Do not specify a count for the last segment; the last one will return all of the unretrieved records.

Deleting segments

You can delete a segment from a segmentation job if the segments have not yet been populated. To delete a segment from a job after the segments have been populated, you must first *purge the lists* (see "[Purging lists](#)").

Caution! Deleting a segment that is referenced in a campaign source code renders that source code unusable.

Populating segments

After you create a segmentation job and add segments, populate the segments in the job to create contact or prospect lists.

When segments are populated, *iMIS* ensures that segments are not populated with any record that would be a duplicate of a record in another segment that is defined for the same segmentation job.

Populating segments can be a very lengthy operation. Segments are populated as a workflow task; you can continue using *iMIS* for other tasks while segments are being populated.

You cannot view the results in the populated segments until the segment population workflow task has been completed.

To repopulate segments that have already been populated, you must first purge the lists and then populate the segments.

After the segments have been populated, you cannot edit the segment definitions. To edit a segment definition after the segments have been populated, you must first purge the lists.

To populate segments

1. From **Marketing**, select **Segmentation**.
2. Open the segmentation job.
3. Click **Populate Segments**.

If no segments are defined, an error message displays.

If the segments have already been populated, **Populate Segments** is disabled.

4. Select the segment to view.
5. Select the **Results** tab to view the segment contents.

Managing segmentation lists

Editing lists

After lists have been populated, you can add contacts or prospects as well as disable any that are already listed (contacts and prospects are enabled by default).

Before you begin

Verify that contacts or prospects to be added are not already in the list. No duplicate checking runs for manually added contacts/prospects.

To edit a contact or prospect list

1. From **Marketing**, select **Segmentation**.
2. Open the segmentation job.
3. Select **Segments**.
4. Select the segment that contains the list to be edited.

5. Select the **Results** tab.
6. (optional) To add a contact or prospect, click **Add Contact**.
7. (optional) To enable or disable a contact or prospect, select or deselect the checkbox displayed to the left of the contact or prospect.
8. Select **Save**.

Purging lists

Purge lists to remove those that you no longer need or to repopulate segments.

Note: The **Purge Lists** button is available only if the segments are populated.

To purge segmentation lists

1. From **Marketing**, select **Segmentation**.
2. Select the segmentation job.
3. Click **Purge Lists**.

Using external lists

Organizations may use external lists. External lists are brokered with individual list agreements that govern how long and how the use can be used.

Sometimes lists are given to the organization with all names and contact information attached. Other times, lists are used once with the organization only seeing the names of the contacts within it when the customer responds.

Lists with Names

Lists with names can be imported into the *iMIS* Acquisition Management tool. Campaigns and Segmentation can query this list and generate lists from it. One of the most important segmentation considerations is being able to test against different list rentals, therefore, it's important to have a testing model.

Lists without Names

Lists without names can still be tracked in Campaigns. At the source code level, assign the quantities included in the list rental. Track the list rental/purchase cost at the package level. Remember that the package gets attached to the source code. Different packages have different list costs so it's important to apply the cost to the package to properly calculate the ROI.

Example: Donor Segmentation

The following is an example of how a segmentation strategy can appear or be mapped during implementation. This example shows one audience that is separated into "life stages". It relies upon keeping track of customer contact preferences and uses RFM as the fundamental segmentation strategy.

For this example, Life Cycle Stage and Contact Preferences are the include/exclude selection criteria. RFM segment definitions will apply to everyone who has who has been selected during core criteria segmentation.

Segmentation		
	Life Cycle Stage	Contact Preferences
New Donors (Acquisition)	<ul style="list-style-type: none"> New ReAcquired 	<ul style="list-style-type: none"> Once / Year Twice / Year Print Only No Print
Renewal Donors	<ul style="list-style-type: none"> Active Renewal Prelapsing (no gift within 24 months) 	<ul style="list-style-type: none"> Once / Year Twice / Year Print Only No Print

Example: Life cycle stages

Example: Event marketing

Association XYZ is preparing to market its annual conference. The venue is booked and sponsors and expo sales are under way. It's time to start raising awareness for the event and getting event registrations through the door.

In this example, there are two different marketing efforts that the association runs to meet these goals. The first is one tests a creative concept for the event. They want to understand which creative concept is more likely to get people to register.

After the creative concept is finalized and 80% of the speakers have been set, the organization is ready to recruit attendees by mailing the event brochure.

Marketing Goal

To recruit attendees for the annual conference.

Marketing Objective

To recruit 500 full conference attendees, 200 partial attendees.

The goals and objectives for this campaign are fairly straight forward. But accomplishing these goals is more complex.

First Mailing: Post Cards

First, XYZ does an A/B Split of the file to understand which creative concept is the better one to use for the rest of the conference marketing series.

Second Mailing: Full Brochure

The second mailing is where we apply some value ranks to our mailing. Full conference brochures are expensive and our goal is to cut numbers to save costs from groups who are least likely to respond.

Planning the campaign

Segmentation will be used in two different ways:

- Mailing 1 = Simple Split

- Mailing 2 = Ordered from most to least likely to respond

Campaign	Appeal	Solicitation	Source Code
Annual Conference	Save the Date Postcard Mailing	Fountain Creative A	Source Code
		Dessert Creative B	Source Code
	Full Brochure Mailing	Past Attendees	Last Attended 08
			Last Attended 07
			Last Attended 06 or earlier
		Non-Attendees	Active Members
			Non-Members

Business Goals

The process to accomplish this scenario is:

1. Create a segmentation job with an A/B split.
2. Build the campaign structure for the event.
3. Generate output and pickup file for the solicitation.
4. Review responses to choose most successful concept.
5. Create a segmentation job with all segment definitions.
6. Mail brochure to list.

Creating a segmentation job with an A/B split

Add a new segmentation job:

- Name = Annual Conference

Create a new query:

- Source – NetContact.
- Filter – Is A Company = No.

Define the n-Select segments:

- **Number of Segments** = 2
- **Use all query results** = selected
- **Contacts per Segment:** Enter the number of records at which you want to cap your segments. If you want two random groups with no cap, leave the 'Use All query Results' checked and enter the number of segments as two.

Populate the segments.

Two segments are created; both have an **Execution Order** of zero.

The screenshot shows the 'Segments' tab in the iMIS interface. At the top, there are tabs for 'Summary', 'Definition', 'n-Select', 'Security', and 'Segments'. Below the tabs is a 'Source' section with a 'Select a Query' dropdown set to 'All Segments' and a 'Filter' button. To the right of the 'Source' section is a 'Hide' link. Below the 'Source' section is an 'Add Segment' link. The main area contains a table with the following data:

	Name	Created Date	Execution Order	
select	Annual Conference_NS_Segment1	1/2/2009	0	delete
select	Annual Conference_NS_Segment2	1/2/2009	0	delete

Example: Conference post card list with A/B split

Building the campaign structure for the event

Define the campaign structure:

- Name = Annual Conference
- Appeal = Save the Date postcard
- Solicitations = Creative A and Creative B

Attach the populated segments to the campaign:

- Select the job that contains the A/B split.
- Select a source code. The source code is attached automatically as the source list for the query.
- Select an insert and attach it to the source code.

Generating the output and the pick-up file

After the list and insert are attached, generate the output on the source code. This process will:

- Update the pie chart and metrics for non-responders
- Produce the output defined in the insert

Setting up the brochure mailing

The brochure mailing will use many different segments. Each segment will become a source code.

Campaign	Appeal	Solicitation	Source Code
Annual Conference	Full Brochure Mailing	Past Attendees	Last Attended 08
			Last Attended 07
			Last Attended 06 or earlier
	Non-attendees		Active Members
			Non-members

Open the segmentation job for this mailing and click the **Segments** tab. Your display may look like the following example:

Source Hide

Select a Query: All Segments Filter

Add Segment

	Name	Created Date	Execution Order	
select	Exclude current registrants	1/2/2009	1	delete
select	Last attended 2008	1/2/2009	2	delete
select	Last attended 2007	1/2/2009	3	delete
select	Last attended 2006 or earlier	1/2/2009	4	delete
select	Active members	1/2/2009	5	delete
select	Non-members	1/2/2009	6	delete

Save Cancel

Example: Segments list

Set up six segments.

The first segment is called **Exclude - Current Registrants**. It includes a query that produces a list of people who are already registered for the conference. By creating this first segment, XYZ will be able to use this job repeatedly.

The **Execution Order** determines the order in which records will be selected. A loyal member has probably:

- Registered for this year's event
- Attended last year's and prior years
- Renewed their membership so they're an active member

Therefore, attach all of the segments to the job except the first. Duplicates in the file will be checked automatically to make sure that a record is only selected once.

- Select everyone who has registered for the event (don't mail them).
- Of the records left in the database, select everyone who registered last year. That segment is the first source code and are also the most likely people to respond this year
- Of the records left in the database, select everyone who registered the year before last. That segment is the second source code and are the second-most likely to respond this year
- Of the records left in the database, select everyone who attended two years ago. That segment is the third source code.
- Continue with the remaining segments.

Creating a segmentation job with all segment definitions

1. Add a new segmentation job.
2. Define the first segment by writing a simple query that defines who should be selected.
3. Define the remaining segments.

4. Assign each segment an execution order that determines the order in which to execute the duplicate checking process.
5. Populate the segments.

Summary | Definition | n-Select | Security | Segments

Source

Select a Query: All Segments

	Name	Created Date	Execution Order
select	Exclude current registrants	1/2/2009	1
select	Last attended 2008	1/2/2009	2
select	Last attended 2007	1/2/2009	3
select	Last attended 2006 or earlier	1/2/2009	4
select	Active members	1/2/2009	5
select	Non-members	1/2/2009	6

Adding to the campaign structure

- Campaign = Annual Conference
- Appeal = Full Conference Brochure
- Solicitations:
 - ☐ Past attendees
 - ☐ People who have never attended
- Source Codes (first mailing):
 - ☐ Last attended last year
 - ☐ Last attended two years ago
 - ☐ Last attended three or more years ago
- Source Codes (second mailing):
 - ☐ Never attended (members)
 - ☐ Never attended (non-members)

Tracking costs for campaigns

To track costs at Appeal or Source Code level

1. Go to Campaign Management.
2. Click **Show / Hide Appeals** and open an appeal.

3. Go to the **Profile** tab and open the **Overhead Cost** panel.

Overhead Cost 9,138.00

Name	Cost	
Printing Invoice 009801	4587.00	delete
Lettershop 10823	2175.00	delete
Postage	2376.00	delete

4. Add an additional cost and click **Save**.
The overhead cost calculation increases.

To add cost to an insert

1. Go to **Marketing > Inserts**.
2. Open an Insert.
3. Click the ... button next to **Total**.
4. Enter a value in the **Cost Code** and a cost per piece in the **Amount**.
5. Click **add**.

Edit Cost

Costs

Cost Code	Amount	
<input type="text"/>	<input type="text"/>	add
Letter	0.02	remove
Other Package Costs	1.37	remove

6. Click **OK** to save the values.

Confirm that the **Total** on the Insert window now shows the sum of the values entered on the **Costs** pop-up.

Insert: December 05 Donor Renewal Appeal

Summary Definition Processes

*Name December 05 Donor Renew

Description

Total 1.39

Status Available

Insert Type None

Output Process

Sum of inserts

Tips

- Operational costs should be tracked at the Appeal or Source Code. The choice of tracking overhead costs at the Appeal or Source Code level is made in **Campaign Management > Set Up Module**.
- Package costs include any items that are applied to the actual insert or package: Those are tracked with the insert costs.
- Overhead Costs refer to any cost that is applied to the mailing or marketing effort as a whole. These costs tend to be difficult to break down on an item by item or cost per piece basis. You want to be able to track the costs against the appeal as a whole rather than trying to break out the costs against different source codes. This is especially true when you have multiple source codes within a marketing effort.
- Some costs apply only to a particular Source Code or part of a marketing effort, such as list rental costs or the difference between different packages sent. Even if you choose to track overhead costs at the Appeal level in your **Campaign Management > System Setup** options, you still have the option to be able track those additional costs. They are tracked as part of the package attached to the source code.

About RFM Analytics

RFM Analytics is an analytical tool that provides rankings for your contacts based upon their financial participation with the organization. It is a very commonly used tool for fundraising, but its applications are not limited to the fundraising marketplace. Any organization that targets contacts based on past participation can benefit from RFM Analytics.

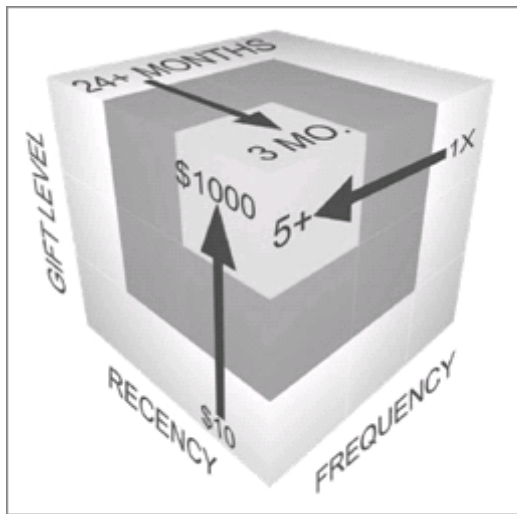
With RFM Analytics, you can:

- Rank and organize your customer population into specific groups manually or automatically.

- Define ranking scores for recency, frequency, monetary, combined (calculated), and total (calculated) values.
- Create groups, such as quintiles, that reflect the relative ranking of customers according to all RFM measurements.
- Analyze transaction patterns to accurately predict future behavior.
- Define different customer population and transaction queries to include in each analysis.

RFM Analytics relies upon three core elements that turn transactional data into a three-dimensional score based on:

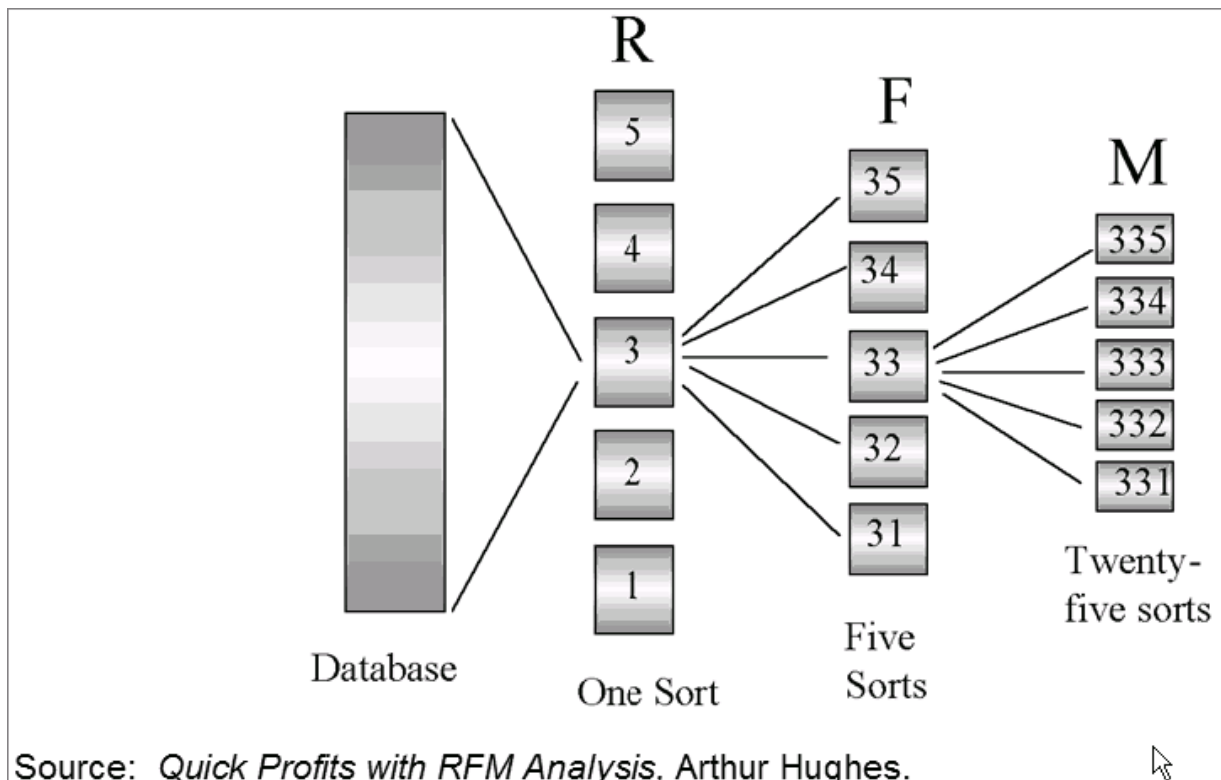
- Recency – How long since the last transaction?
- Frequency – How often does this transaction occur?
- Monetary Value – How much are these transactions worth?



RFM Analytics scoring

Rankings, once run, result in a score being assigned to each record. This score is important because ranks contacts/prospects within a matrix of highest to lowest values.

There are different schools of thought about how to use RFM scores. Some organizations use the total score ($1+1+1 = 3$). Others use the product of the score ($1*1*1 = 1$) and others use a concatenation of the scores (111).



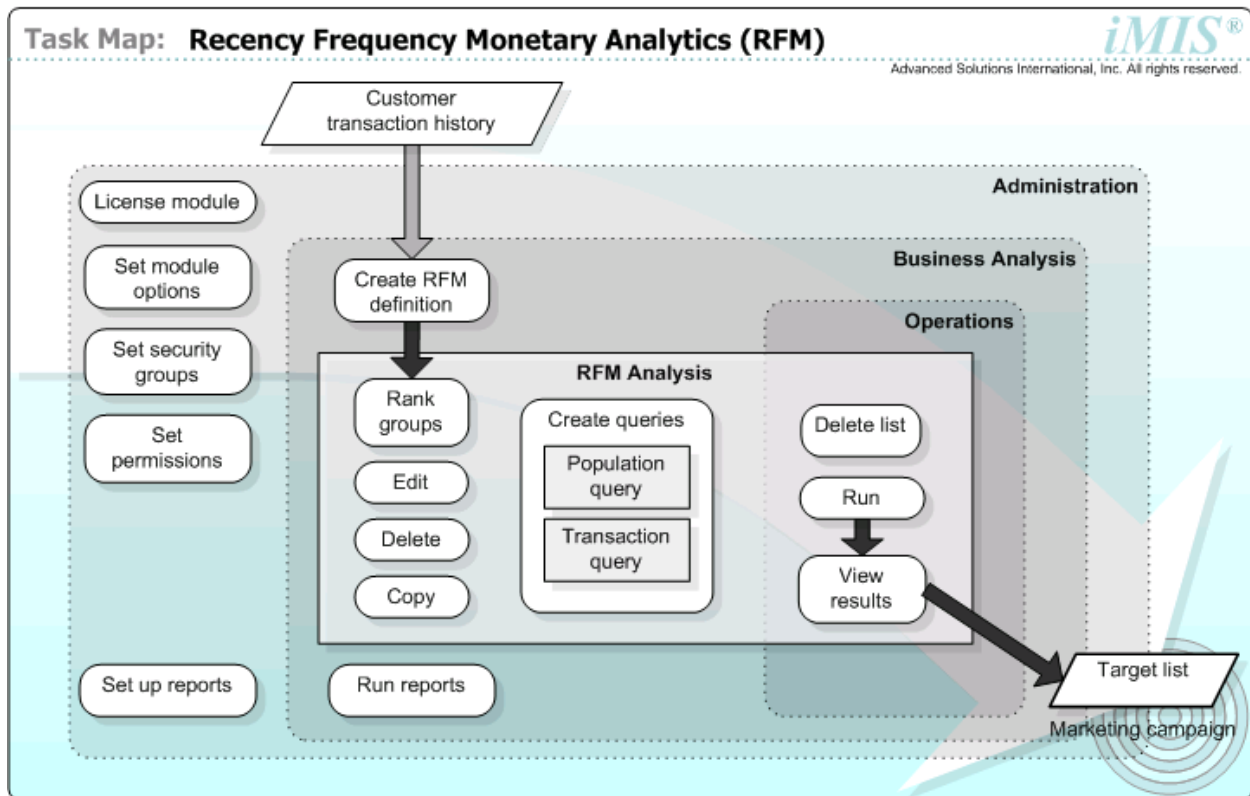
Example RFM ranking

Tips for implementing RFM Analytics

- If you are running an RFM ranking for the first time, the automatic ranking might be able to help establish a first pass at quartiles or quintiles. However, make sure to review the results to see whether these rankings are correct for your organization. There is a danger in using and re-using automatic rankings for target marketing purposes. Automatic rankings will always produce equal buckets rather than telling you who is falling where based on typical transactional behaviors. After determining some basic highs and lows for each category, use the manual ranking to define those buckets and continue to evaluate the results.
- The key to successfully using RFM Analytics in any organization is having the patience to watch how people perform over a long period of time. Remember that anything can impact behavior and do not react immediately to changes. RFM buckets tend to remain stable.
- Build your queries separately. Do not use **Save As** to copy queries. There may be some unwanted criteria carried over from the original query.
- Make sure the transaction query Includes **Quantity**, **Amount**, and **Transaction Date**. These properties are used for the ranking. You can alias other properties if you wish, such as aliasing **Date Received** or **Effective Date** as the **Transaction Date**.

Task Map: RFM Analytics

This diagram illustrates RFM Analytics core tasks by the approximate order they occur (top-left to bottom-right) and by the organizational area that performs them.



Task Map: RFM Analytics

Example: Interpreting RFM rankings

The following example uses RFM rankings to identify prospects for a specific campaign.

Interpreting recency rankings

In this case, low values correspond to the most recent transactions.

Recency		
1	1	+ ×
2	13	+ ×
3	25	+ ×
4	37	+ ×
5	49	+ ×
6	61	+ ×

Interpret these rankings as:

- 1 – Received within the last day
- 13 – Received from 2 to 13 days ago
- 25 – Received from 14 to 25 days ago
- 37 – Received from 26 to 37 days ago
- 49 – Received from 38 to 49 days ago
- 61 – Received from 50 to 61 days ago

Interpreting frequency rankings

Frequency		
1	1	+ ×
2	5	+ ×
3	10	+ ×
4	15	+ ×
5	20	+ ×
6	25	+ ×

Interpret these rankings as:

- 1 – Donated once
- 5 – Donated from 2 to 5 times
- 10 – Donated from 6 to 10 times
- 15 – Donated from 11 to 15 times
- 20 – Donated from 16 to 20 times
- 25 – Donated from 21 to 25 times

Interpreting monetary value rankings

Monetary

1	250	+	×
2	500	+	×
3	750	+	×
4	1500	+	×
5	2000	+	×
6	2500	+	×
7	3000	+	×

Interpret these rankings as:

- 250 – Amount donated is 250 or less
- 500 – Amount donated is 251 to 500
- 750 – Amount donated is 501 to 750
- 1500 – Amount donated is 751 to 1500
- 2000 – Amount donated is 1501 to 2000
- 2500 – Amount donated is 2001 to 2500
- 3000 – Amount donated is 2501 to 3000

Creating RFM analysis definitions

RFM Analytics requires that two queries work together:

- Population query – Determines who will be analyzed
- Transaction query – Determines what will be analyzed (for example, date, quantity, amount)

Tips for creating RFM Analytics definitions

- You can copy and edit existing RFM definitions for efficiency.
- After you define the RFM analysis, you can run it repeatedly to create or update the list of segments generated.

Before you begin

Make sure the population query and transaction query are set up.

To create an analysis definition

1. From **Marketing**, select **RFM Analytics**.
 2. From the **New** drop-down list, select **RFM Definition**.
 3. Identify each RFM model with a unique name (duplicate names are allowed).
 4. Determine whether ranges should be set automatically or manually:
 - When setting ranges automatically, enter a value greater than zero for at least one range.
 - When setting ranges manually, specify the **Recency**, **Frequency**, and **Monetary** ranges.
- The query is saved to the default RFM Process Engine folder unless specified otherwise.

Ranking groups automatically

RFM Analytics divides the number of groups specified using the following procedure when groups are ranked automatically:

- Sorts lists based on criteria (Recency, Frequency, and Monetary)
- Divides the population equally into the specified number of groups
- Starts at the top of the list and ranks each contact based on the group
- Creates an equal number of contacts for each group:
 - The lowest-numbered group corresponds to the least desirable ranking.
 - The highest-numbered group corresponds to the most desirable ranking.
 - The last group may contain a different number of contacts than the other groups depending on the population and number of groups.
 - Some groups will be empty if the number of contacts is less than the number of groups.
 - Two contacts with the same score may be placed in different groups.

Ranking groups manually

When ranking groups manually, you must enter criteria for each ranking group.

Note: When defining your manual rankings, you should use higher numbers for more desirable rankings and lower numbers for less desirable rankings to conform to industry standards for RFM rankings.

The screenshot shows a software interface for manual RFM ranking. At the top, there are four tabs: 'Summary', 'Definition', 'Rankings', and 'Results', with 'Rankings' being the active tab. Below the tabs, there is a section titled 'Ranges' with two radio buttons: 'Automatic' and 'Manual', where 'Manual' is selected. Underneath, a 'Ranking Values' section is displayed, organized into three columns: 'Recency', 'Frequency', and 'Monetary'. Each column contains a list of input fields for ranking groups. In the 'Recency' column, groups 1, 2, and 3 have values of 15, 10, and 5 respectively, with a fourth empty field labeled '(4)'. In the 'Frequency' column, groups 1, 2, and 3 have values of 0, 20, and 30 respectively, with a fourth empty field labeled '(4)'. In the 'Monetary' column, groups 1, 2, 3, 4, and 5 have values of 50, 100, 200, 500, and an empty field labeled '(5)' respectively. Each input field is accompanied by '+' and '-' buttons for adjustment.

Example: Manually ranking RFM values

Recency

The criteria for ranking Recency is based on the last time the individual had contact with the organization. The date used is based on the Transaction Date specified in the Transaction Query. The following example illustrates how Recency is ranked:

- Group 1: >10 days and <=15 days, value = 15
- Group 2: >5 days and <=10 days, value = 10
- Group 3: <=5 days

Frequency

The criteria for ranking Frequency is based on the number of times the individual had contact with the organization. The value is calculated by the number of records for an individual in the Transaction Query. The following example illustrates how Frequency is ranked:

- Group 1: <20 times and >=0 times, value = 0
- Group 2: <30 times and >=20 times, value = 20
- Group 3: <50 times and >=30 times, value = 30
- Group 4: >=50 times, value = 50

Monetary

The criteria for ranking Monetary is based on the amount of money the individual has spent with the organization. The amount is based on the total amount from the Transaction Query. The following example illustrates how Monetary is ranked:

- Group 1: <0 and >=50, value = 50
- Group 2: <50 and >=100, value = 100
- Group 3: <100 and >=200, value = 200
- Group 4: >200 and >=500, value = 500

Generating and querying RFM analysis results

To generate and query RFM results

1. From **Marketing**, select **RFM Analytics** and open the RFM analysis definition.
2. Click **Run**.

A status message displays on the Summary tab. If an error message such as "An error has occurred while generating Lists" appears, click on the message to see more details.

3. View the results on the **Results** tab.

Your results may look similar to the following example:

Summary

Definition

Rankings

Results

Delete List

Create Query

Viewing 1 thru 20 of 70 results

1234

User Id	UserName	Recency	Frequency	Monetary	Combined	Total	FirstContact	LastCo
110	Mr. Wayne Courtland	5	4	2	50402	11	11/10/1993 12:00:00 AM	1/13/2000 12:00:00
112	Mr. James B. Soup, Jr.	2	4	2	402	6	4/15/1994 12:00:00 AM	5/15/1995 12:00:00
114	Mr. John Doebler	5	4	1	50401	10	10/20/1993 12:00:00 AM	1/13/2000 12:00:00
PEPPER	Mr. Robert P. Pepper, CPA	3	4	2	402	6	12/20/1993 12:00:00 AM	1/1/1997 12:00:00
116	Mr. Phillip N. Davis, Jr.	3	4	2	402	6	1/1/1994 12:00:00 AM	1/15/1995 12:00:00
117	Ms. Mary P. Miles	4	4	2	40402	10	4/10/1994 12:00:00 AM	1/25/2000 12:00:00
118	Mr. Samuel K. Holmes	5	4	2	50402	11	1/15/1994 12:00:00 AM	1/13/2000 12:00:00

To query the results of an RFM analysis

1. From **Marketing**, select **RFM Analytics** and open the RFM analysis definition.
2. Select contacts from the following RFM criteria:
 - ☐ Recency ranking
 - ☐ Frequency ranking
 - ☐ Monetary ranking
 - ☐ Combined ranking
 - ☐ Total ranking
 - ☐ First amount
 - ☐ First amount date
 - ☐ Last amount
 - ☐ Last amount date
 - ☐ Highest amount
 - ☐ Highest amount date
3. To purge the results, select **Delete List**.
4. To create a query for use in Campaigns, select **Create Query**.

Using RFM Analytics with Segmentation

RFM rankings can be used as the basis for segmentation. Segmentation assists with targeting the market or the segment of the database who is most likely to respond to the marketing effort. For example, if your marketing department is trying to mail the company contact of their best conference attendees, they might look for:

- Recency going back 5 years
 - Frequency of attendance being greater than ten times attending (because this would imply that at least two attendees from that company attended within those 5 years)
- and
- Value = to increments of conference registration because that's the value of their attendance (anyone with a value higher than that might have purchased books at the conference or made a donation above and beyond the registration fee).

You can use the same ranking model against different groups or populations within your database to be able to make predictions and better target who is most likely to respond to a particular marketing effort. The RFM rankings may look the same, but the numbers within each rank may be quite different.

Example: Creating a fundraising campaign

In this example, the campaign manager for the Research Foundation wants to create a fundraising campaign. The Research Foundation, which researches human diseases and develops vaccines, is preparing for its annual Ride for Research fundraising event.

The Ride for Research event is a weekend-long bicycle ride that has been very successful in generating revenue and awareness for the foundation's research. To attract riders for this year's event, the foundation will conduct a direct-mail marketing campaign that targets past and potential riders.

Create the campaign

Define the campaign:

- ☐ **Name:** Ride for Research
- ☐ **Campaign Code:** 05RR
- ☐ **Description:** Our annual series of events that serve as our major outreach and awareness campaign. The series culminates in our annual bicycle ride.
- ☐ **Campaign Type:** Annual
- ☐ **Status:** Active
- ☐ **Start Date:** 03/01/2006
- ☐ **End Date:** 02/27/2007
- ☐ **Predicted Response Rate:** 14.00

Create the direct mail appeal

Define the direct mail appeal:

- ☐ **Name:** Direct Mail Appeal
- ☐ **Description:** Direct mail appeal to attract riders for the Ride for Research event.
- ☐ **Status:** Active
- ☐ **Start Date:** 04/01/2006
- ☐ **End Date:** 04/30/2006
- ☐ **Predicted Response Rate:** 11.00

Create the products monitored by the campaign

When a monitored product (product linked to the campaign at the appeal level) is purchased (or a donation is made), the response management feature of Campaign Management automatically captures the product sale, which then is used for monitoring and measuring the campaign's performance.

In the *iMIS* Events module, define the event:

- ☐ **Event Code:** 05RR
- ☐ **Title:** 2005 Ride for Research
- ☐ **Status:** A
- ☐ **Begin Date:** 02/26/2006
- ☐ **End Date:** 02/27/2006
- ☐ **Maximum:** 25000
- ☐ **Fundraising Event:** Enabled
- ☐ **Entity Code:** General Fund
- ☐ **Campaign:** 05RR

Define the Event Registration function:

- ☐ **Function Code:** REG
- ☐ **Title:** Event Registration
- ☐ **Type:** REG
- ☐ **Status:** A
- ☐ **Begin Date:** 02/26/2006
- ☐ **Time:** 7:00 AM
- ☐ **End Date:** 02/27/2006
- ☐ **Time:** 5:00 PM
- ☐ **Description:** Registration for the Ride for Research fundraising event.
- ☐ **Maximum:** 25000
- ☐ **Automatic Option:** Enabled
- ☐ **Fees:** 100.00 Regular
- ☐ **Income Account:** General Income

In the *iMIS* Orders module, create the Product category:

- ☐ **Category:** Product
- ☐ **Description:** Order Products
- ☐ **Stock Item:** Enabled
- ☐ **Taxable:** Enabled

Create the Ride for Research coffee mug product:

- ☐ **Code:** RR-MUG
- ☐ **Category:** Product

- ☐ **Status:** Active
- ☐ **Title:** 2005 Ride for Research Coffee Mug
- ☐ **Pricing:** 8.00 Regular
- ☐ **Unit of Measure:** Each
- ☐ **Weight:** .5
- ☐ **Stock Item:** Enabled
- ☐ **Taxable:** Enabled

Add the products to the direct mail appeal

Assign the monitored products (05RR and RR-MUG) to the campaign's Direct Mail Appeal.

Create the solicitation for riders

The marketing plan is to solicit all Research Foundation members to ride in the Ride for Research event.

Define the Solicitation for Riders:

- ☐ **Name:** Solicitation for Riders
- ☐ **Description:** Core solicitation with specific requests for participating in and sponsoring the Ride for Research event.
- ☐ **Status:** Active
- ☐ **Reminder Date:** 04/09/2006
- ☐ **Start Date:** 04/10/2006
- ☐ **End Date:** 04/17/2006
- ☐ **Predicted Response Rate:** 14.00

Create the source code package for potential riders

This source code package will be sent to all potential riders in the Ride for Research event.

Define the Riders source code:

- ☐ **Code:** Riders
- ☐ **Description:** Package to contacts for riding in the Ride for Research event.
- ☐ **Status:** Active
- ☐ **Overhead Cost:** CC_01 = Cost Code, 500 = Amount
- ☐ **Predicted Response Rate:** 14.00
- ☐ **Target Revenue:** 75000
- ☐ **Source Code Type:** Run Many
- ☐ **List Member Type:** Contact

Create the source list: All Contacts query

Create the inserts

Create the following inserts:

- ☐ 10" x 15" envelope

- ❑ Brochure
- ❑ Business return envelope
- ❑ Postage
- ❑ Registration form

Add the inserts to the source code

Add the following inserts to the Riders source code:

- ❑ ENV10X15
- ❑ BRCHR
- ❑ RTNENV
- ❑ POSTAGE
- ❑ RegForm

Communications and Reporting

Communications tools help you build messages to be sent to targeted contacts. In addition, you can run reports about a campaign or a portion of a campaign. These messages and reports are considered “output” and can be generated at any of the four campaign levels:

- Campaign
- Appeal
- Solicitation
- Source code

In addition, you can import and export source lists.

Lists with names can be imported into *iMIS* Acquisition Management. Campaign Management and Segmentation can query this list and generate lists from it. One of the most important considerations is being able to test against different list rentals. Therefore, it is important to have a testing model.

Lists without names can still be tracked in Campaign Management. At the source code level, assign the quantities included in the list rental. Track the list rental/purchase cost at the package level. Remember that the package will be attached to the source code. Different packages have different list costs, so it is important to apply the cost to the package to properly calculate the ROI.

Kill files

Kill files may be prepared to accompany marketing campaigns, particularly acquisition campaigns. To prevent redundancy, an organization should run a de-duping or merge/purge of their house file (the active names) within their *iMIS* database and the lists that they rent.

If your organization is using these files, prepare both a segmentation job and output file specific to kill files.

Setting up output processes

Output processes are the means to generate collateral for your campaign:

- **Word Merge** – Print a mail merge document
- **Email Merge** – Send an email message

- **Campaign List Export** – Generate a list to be sent to an external vendor for letter shopping or to contacts via listserv
- **RFM Analytics** – Rank records based on Recency, Frequency and Monetary Value
- **Opportunity Process Engine** – Generate projects/opportunities based on complex business rules or in response to a campaign.

You can generate output from a campaign, appeal, solicitation or source code. When you generate output from one level, such as an appeal, output for all of the components beneath it generates. For example:

- **Appeal** – generates output for all solicitations and source codes beneath it
- **Solicitation** – generates output for all source codes linked to it
- **Source Code** – generates output for that one source code only

Word merges and campaign list export files are stored inside Campaign Management after running. Use the **View Output** menu to see the results.

Tips for setting up output processes

- Throughout the Marketing Suite, NetContact is a required business object. Make sure that you include it in all of your queries, regardless of whether they are used as source lists for source codes or as output queries for an output process attached to a source code.
- Use templates for best efficiency. Some templates are designed through third-party packages which integrate with *iMIS*; for example, Microsoft Word documents, emails, and report files. Most output processes allow you to define and save the template while you build the process itself.
- Process Manager must be set up before running the opportunity output process.

Business goals

The process for generating output is:

1. Build the campaign structure first and define the source list (query, a previous solicitation, or a segmentation job).
2. Define an insert.
3. Customize the insert template, if necessary, for this specific need.
4. Attach the output process insert to one or more source codes.
5. Generate the output.

Seed lists for campaigns

A seed list is a list of the individuals within your organization concerned with the campaign. Seed lists are often used to confirm the mail date and to distribute samples internally.

Seed lists are often attached to campaigns but usually not to source codes so that the seed list is not included in the return on investment (ROI) calculations.

Queries for output processes

Using queries to generate output

When a process is run independently of Campaign Management, the process uses the query in its definition to determine the set of generated records. When the same process is executed as part of a campaign's output generation process, the set of records is determined by joining the query with the campaign's target list to form a subset of records. If the process's query does not have records in common with the target list, no output will be generated for that source code.

The source that you should use for the query depends on how you will use the output process. You must typically define two separate output processes for marketing inserts because source codes and job segments differentiate between contacts and prospects.

- Job segments are defined as a contact job or as a prospect job.
- Source codes are designated as a contact source codes or as a prospect source code.

So, to send marketing inserts to both your contacts and your prospects, you would need to create two different inserts:

- One insert must use an output process whose query source is the NetContact business object
- The other insert must use an output process whose query source is the Prospect business object.

Note: You should not use CSContact or CSProspect as the query source for any output process associated with marketing inserts. Use only the NetContact or the Prospect business object as appropriate, depending on the associated source codes and job segments.

Setting up Marketing Suite

Licensing and installing

Follow standard *iMIS* procedures for licensing and installing Campaign Management.

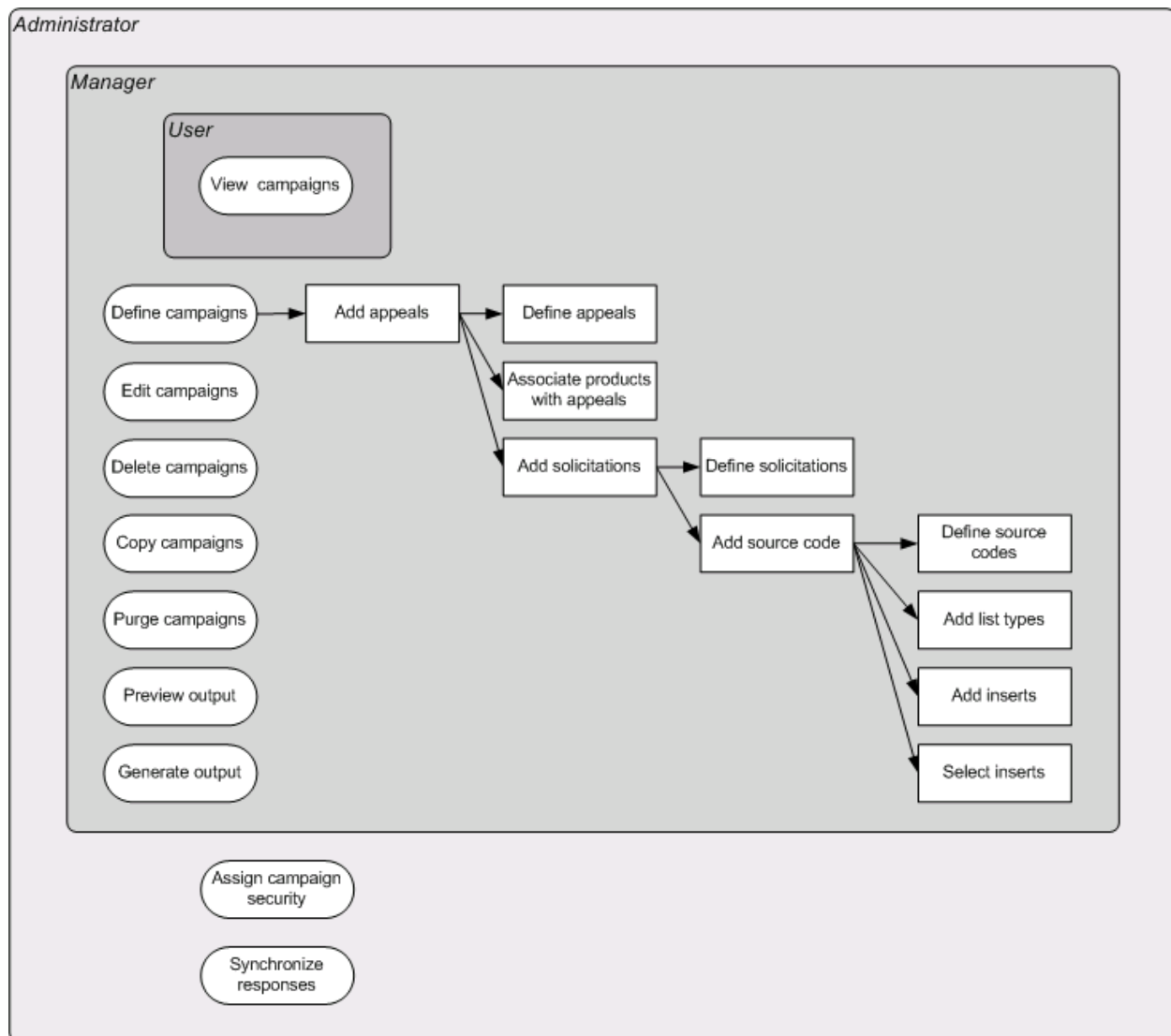
After installation, you must synchronize responses before other setup tasks. This initializes the database to recognize new product sales only so that the response reporting does not include previous sales.

Setting up security groups for campaigns

Security groups specify levels of access and control for users. Each user must have a record in the database before you can add them to a security group.

Campaign Management security groups

- CampaignAdmin: Has full control access for all campaigns.
- CampaignMgr: Has read, add, edit, and delete access for the module and read and edit access for all campaigns.
- CampaignUser: Has read-only access for campaigns.



Campaign tasks by security group

Segmentation security groups

- SegAdmin: Has full control access for all segment setup and segmentation jobs.
- SegMgr: Has read, add, edit, and delete access for all segments and jobs.
- SegUser: Has read-only access for segmentation jobs.

RFM Analytics security groups

- RFMAdmin: Has full control access for RFM Analysis setup and processes.
- RFMMgr: Has read, add, edit, and delete access for all analysis and reports.
- RFMUser: Has read-only access for reports.

To add users to security groups

1. From **Marketing**, select **Set up campaign module > Security Groups** tab, or **Set up segmentation**, or **Set up RFM**.
2. Select a security group.

3. Under **Select New Members**, search for and select the additional users.
4. Click **Save**.

Setting up reports and output processes

iMIS communications tools give you the power to optimize communications within your organization and with outside contacts. By using templates and pre-built reports, your staff can be productive immediately. They can generate reports and email messages, send Microsoft Word letters, and export data to Excel spreadsheets or other analysis tools without detailed knowledge of database structure or report configuration. See *Communications and reporting* for more information.

Setting up Campaign Management

Set up Campaign Management according to the method your organization uses to track and process data. These options apply to all campaigns. Use the Business Object Designer to track additional information that is important to your organization's marketing success.

Source code ID mode

This setting determines whether source codes will be generated manually or automatically.

- **Manually** – When enabled, the **Manually-Assigned** option governs the **Set up module** page's **Source Code Name Format** field and the source code **Definition** tab's **Code** field:
 - The **Source Code Name Format** field is disabled.
 - The **Code** field is editable until the source code is saved; once saved, the **Code** field cannot be edited.
 - The **Code** field is blank when first creating a source code.
 - You must enter a unique value in the **Code** field to save a source code.
- **Automatically** – When enabled, the **Auto-Assigned** option governs the **Set up module** page's **Source Code Name Format** field and the source code **Definition** tab's **Code** field:
 - The **Source Code Name Format** field is enabled.
 - The **Code** field is read-only.
 - The **Code** field populates automatically with a unique value when saving a source code.

Tracking costs

You can track campaign costs by appeal or by source code.

Tracking by appeal – If the budget and costs are tracked at the appeal level:

- Total costs display at the campaign and appeal levels only.
- Users can view the Total Cost, Target Revenue, Predicted Response Rate, and ROI for a campaign.
- Users can enter and edit the Overhead Cost, Target Revenue, and Predicted Response Rate for an appeal.
- Users cannot view or edit costs for a solicitation or source code.
- Users can enter costs for an insert, but these costs are ignored in the campaign and appeal cost calculations.

Tracking by source code – If the budget and costs are tracked at the source code level:

- Users can view the Total Cost (estimated or actual), Target Revenue, Predicted Response Rate, and ROI for a campaign, appeal, or solicitation.

- Users can edit the Overhead Cost, Target Revenue, and Predicted Response Rate for a source code.
- Users can view the Total Cost (estimated or actual) for a source code.
- Users can enter costs for inserts, which are used for cost calculations.
- The **Summary** tab for a campaign, appeal, solicitation, and source code display Estimated Cost until output is generated. After generating output, Actual Cost displays. (For a campaign, appeal, or solicitation, the **Summary** tab displays the Actual Cost if output has been generated for any child source codes; otherwise, Estimated Cost displays.)
- The **Calculate Estimated Costs** button displays on the campaign, appeal, solicitation, and source code portfolio pages.

About auto-map source codes when retrieving responses

If selected, this setting automatically maps source codes to orders, gifts, and pledges if a source code is not provided when synchronizing responses. The source code is obtained from *iMIS* **Events**, **Orders**, or **Fundraising**.

If the setting is not selected, *iMIS* does not recognize responses if an order, gift, or pledge does not have an associated source code.

Note: This feature applies only if one or more products are associated with an appeal.

To set Campaign Management options

1. From **Marketing**, select **Set up campaign module > Options** tab.
2. Enable the desired options:
 - ☐ Choose the **Source Code ID Mode: Manually-Assigned** or **Auto-Assigned**.
 - ☐ If **Auto-Assigned** is enabled, enter the **Source Code Name Format**.
 - ☐ Choose the **Budget Level: Appeal** or **Source Code**.
 - ☐ Check to select **Auto-map source codes when retrieving responses**.
3. (optional) Enter the **Opt Out URL** and the **Opt Out Key** which *can be used when editing an email template* (see "Defining output processes") for customers who want to be removed from a mailing list.
4. Click **Save**.

Understanding opt-out configuration

Sometimes people want to be removed from a campaign mailing list. This action is called opting out. Campaign managers want to know the number of people who opt out of a campaign and which source code is related to the opt-out action.

Understanding the tracking of opt-outs helps you analyze the campaign's effectiveness. Opt-outs are tracked from the originating source code so that your campaign manager knows the source code that caused the opt-out action.

Two settings and inserting code into an email template control the opt out configuration:

- **Marketing > Set up module > Opt Out Url** field points to a special opt out page, such as <http://www.domainname.org/iMIS/OptOut.aspx>. When the person clicks on the link in the email containing the Opt Out code, they are taken to this page. The page can contain instructions for choosing to be removed from the list, or request further information for why the message caused the email recipient to choose to be removed.

- **Marketing > Set up module> Opt Out Key** field contains %OPTOUTURL% by default. This field contains the code that you insert into the email template in the HTML code. You could change it to %REMOVED% or another variable name, but you must be sure to change the code in the email templates that use the Opt Out Key in them.

When you create an email merge template, use HTML, not plain text, and use %OPTOUTURL% for the URL for the link. For example, add the text, "If you want to be removed from our campaign, click here." Highlight "click here" and insert a link. Enter %OPTOUTURL% as the **URL** and choose **Other** as the **Type**.

Using this email merge, generate output from a source code. The email messages are generated and sent.

When an email recipient clicks the "click here" link in the campaign email, they go to the URL for the **Opt Out Url** page configured in **iMIS Marketing > Set up module**.

If you have more than one source code in one campaign that solicits the same prospect, opting-out for any one source code should opt-out all source codes in the campaign that have solicited that prospect. In addition, *iMIS* discontinues all further campaign appeals, solicitations, and source codes for that prospect, even those that are created after the opt-out. In short, any future lists automatically exclude that contact from being selected again.

For example, when you look at the **Record Responses** area and look up an ID, you see every source code the person with that ID is being solicited for. If a member is solicited by two different source codes within the same campaign, they are shown as opted-out of both campaigns.

Solicited and unsolicited responses

The definition of a solicited response is twofold. One definition is an order (product, event, fundraising) or opportunity that has a source code associated with it and the primary contact (or BT_ID) has been solicited for the source code. The other definition is associated with an order that contains no source code but does contain a product that is associated with an appeal and the primary contact (BT_ID) has been solicited for a source code within the appeal. For the second definition to be recognized as a response, automatic source code mapping must be enabled. Opportunities that do not reference a source code are not calculated as a response.

The definition of an unsolicited response is also twofold. One definition is an order (product, event, fundraising) that has a source code associated with it and the primary contact (BT_ID) was not solicited for the source code. The second definition is an order that contains no source code but does contain a product that is associated with an appeal, but the primary contact (BT_ID) has not been solicited for any source codes within the appeal. For the second definition to be recognized as a response, automatic mapping of source codes must be enabled. Auto-mapping of unsolicited responses is not a perfect implementation.

The begin and end dates of the source code, solicitation, appeal, and campaign are ignored when recognizing responses for both explicit or indirect responses. This design means that an order generated past the campaign end date still generates a response to the campaign.

Events and responses

Responses are created as one response per order or event registration. A single event registration for ten contacts would be recorded as a single response.

Example: Segmentation queries for RFM analysis

The following example illustrates queries for segmentation and RFM analysis.

1. In IQA, create the segment queries.

2. Write a query to suppress Opt Out responses. For example:

The screenshot shows the 'Sources' tab in the iMIS 15 interface. The 'Mode' is set to 'Basic'. The 'Sources' section lists two sources: 'Contact' and 'CsOpt_Out', both of type 'Business Object'. The 'Relations' section shows a single relation: 'Contact to AMA Opt Outs (When Contact.iMIS Id = CsOpt_Out.ID)' with a comparison operator of 'Equals'. The 'Description' field is empty.

Source	Type
Contact	Business Object
CsOpt_Out	Business Object

Description	Comparison
Contact to AMA Opt Outs (When Contact.iMIS Id = CsOpt_Out.ID)	Equals

3. Write the query for a Segment Definition 1. This segment includes anyone who has purchased seminar 6515 this year.

The screenshot shows the 'Sources' tab in the iMIS 15 interface. The 'Mode' is set to 'Basic'. The 'Sources' section lists three sources: 'Contact', 'EventRegistration', and 'EventSessions', all of type 'Business Object'. The 'Relations' section shows two relations: 'Contact to EventRegistration (When Contact.iMIS Id = EventRegistration.Ship to Id)' and 'EventRegistration to EventSession (When EventRegistration.Order Number = EventSessions.Order Number)', both with a comparison operator of 'Equals'. The 'Description' field is empty.

Source	Type
Contact	Business Object
EventRegistration	Business Object
EventSessions	Business Object

Description	Comparison
Contact to EventRegistration (When Contact.iMIS Id = EventRegistration.Ship to Id)	Equals
EventRegistration to EventSession (When EventRegistration.Order Number = EventSessions.Order Number)	Equals

4. Write the query for Segment Definition 2. This segment includes HR Professionals.

The screenshot shows the 'Filters' tab in the iMIS 15 interface. The 'Mode' is set to 'Basic'. The 'Where' section shows two filters: 'Functional Title' with a comparison operator of 'Contains' and a value of 'HR', and 'Functional Title' with a comparison operator of 'Contains' and a value of 'Human Resource'. The 'Description' field is empty.

Property	Comparison	Value
Functional Title	Contains	HR
Functional Title	Contains	Human Resource

5. Create the job. The job is a container for all of the segments to be run.
 - Create the first segment: Suppress query - Catalog opt outs
 - Add the remaining segments.
6. Populate the segments.

Your results page may look like the following example:

Job

Segments

Summary

Job Summary

Name AMA - Sarah Hoddinott			
Description			
Universe		Last Run Date	9/14/2005
Status	Active	Last Run By	MANAGER
Created By	MANAGER	Created Date	9/14/2005
Updated By	MANAGER	Inactive Date	

3 Segment(s) have been found for this job

Lists have been generated

Process Manager

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Overview of Process Manager

Process Manager helps you to optimize the opportunities presented to your organization, build ongoing relationships, and manage processes assigned to individuals or groups. You also have the means to analyze, forecast, and report on the efforts. With Process Manager, your staff can coordinate their tactics effectively using a centralized overview of all relevant information.

Use Process Manager to coordinate interrelated efforts such as:

- Developing relationships
 - Sales opportunities
 - Prospective donors
 - Sponsorships
- Managing multi-stage projects
 - Conference planning
 - Editorial reviews
- Optimizing processes
 - Membership applications

□ Issues/Resolutions

Run your business more efficiently with Process Manager:

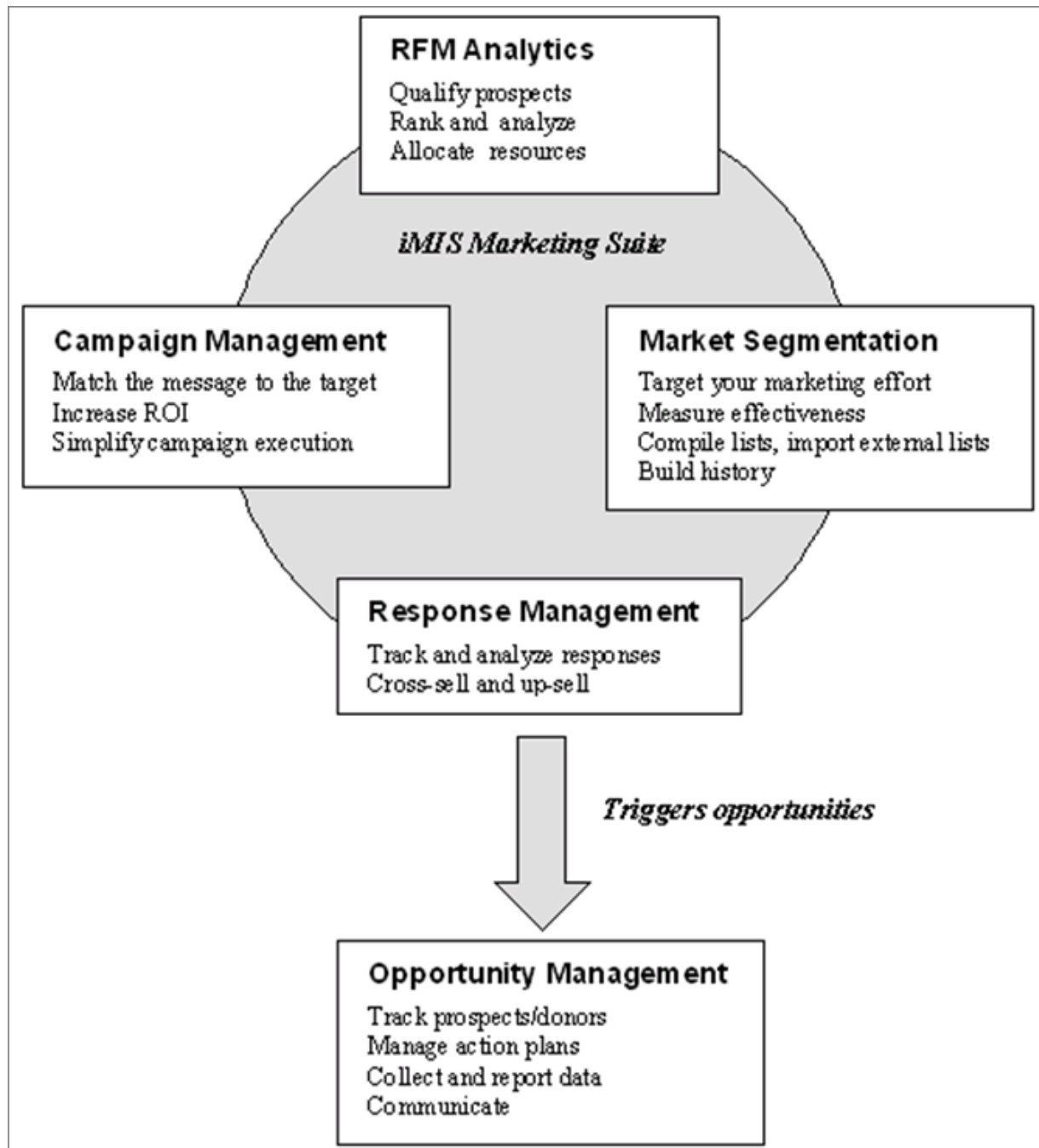
- Track sales/donor/sponsorship opportunities with default workflows or with action plans you build for your specific processes.
- Build rewarding customer/donor relationships by tracking history, key milestones, contact information, and other data that helps you support the relationship.
- Forecast and analyze performance through tracking and reports.
- Provide effective communications for your staff and your prospects with effective data presentation, e-mail notifications, and MS Word mail merge letters.
- Maintain multiple opportunities per contact, each with separate data.
- Add individual or company records to the *iMIS* database directly from Process Manager.

Using Process Manager with Marketing Suite

Get the right message to the right person at the right time. Use Process Manager with Marketing Suite to integrate your organization's marketing efforts for maximum efficiency and success.

Use Marketing Suite to plan and implement mass communications to contacts, members, donors, new prospects, or other targeted groups. Through response tracking and analysis, you can identify opportunities to be pursued.

These projects can be generated automatically based on specific criteria. They appear in the opportunity list and contain contact information and comments. In addition, these opportunities indicate the source codes from Campaigns that identify the marketing source code and affiliated campaign/appeal that may have produced the opportunity.



Marketing Suite and Process Manager integration

Process Manager concepts

A project is any circumstance that could result in a positive action for your organization, such as a purchase, donation, or registration. The definition of a project is flexible, so you can tailor it to your specific needs:

- A project can be assigned for a prospect who is a single individual or for an organization, department, company, or family.
- A project uses an action plan that includes the tasks needed to move from 0% probability of success to 100%.
- A project assigns workflow to an “owner” and allows others within an organization to be identified as participants who contribute to the success of the project.

Process Manager terms

access privilege

Permission granted to one or more users, groups, or roles for accessing specific areas of functionality within *iMIS*.

Account Administrator

A high-level user with full access and privileges to all setup, maintenance, and data entry areas involving accounting-related tasks. An Account Administrator has all access and privileges granted to any Accounting User.

account receivable

Amount a customer owes the company for credit purchases.

Accounting User

A mid-level user with limited access and privileges to specific maintenance and data entry areas involving accounting-related tasks. Different accounting users may have different specific privileges depending on the tasks for which they are responsible.

action

A task within a stage that is assigned to an individual or group for a specific opportunity; *for example*, a telephone call or an e-mail.

action plan

Pre-defined actions that take place in a certain order and in a specific timeframe. Action plans are made up of stages and tasks.

adjustment

Any accounting transaction that results from an adjustment of inventory, orders, invoices, or payments; *for example*, transactions stemming from credit memos, debit memos, inventory adjustments, and returned checks.

adjustment interface

Accounting process that will generate the adjustment and adjustment application lines based on the data passed from the commerce engine, export file, or user manually entered adjustment.

alias

An alternate name for a column (property). *For example*, you could define **Postal Code** as the alias for the **Zip** column name.

asynchronous process

A process that runs independently (in the background) of other processes. Other processes may be started before the asynchronous process has finished.

bound query

A query that is connected to an output process definition and cannot be overridden at runtime.

budget level

The configuration setting on the Campaign Management **Set up module** page for specifying whether Target Revenue and budgets are tracked at the appeal or source code level.

business object

A collection of self-contained data that represents an entity or process and shields the physical data. *For example*, the CsContact business object can represent a view of a person or organization and the processes that a person or organization can perform.

cash receipt

Cash received through checks, credit card charges, and currency. Cash can be received at the same time as the order (*for example*, a prepaid order) and therefore applied specifically to that order and/or it can be received to apply towards open receivables. In some cases, cash can be received without sufficient application instructions, leaving the unapplied portion an unrestricted open credit.

cash receipt interface

Accounting process that will generate the payment and payment application lines based on the data passed from commerce engine, export file, or manually entered payment.

comparison method

Specifies the method by which data is restricted for a column. *For example*, to return orders for more than \$1000.00, create a filter set that uses the “Greater” **Comparison** operator and enter “1000” in the **Value** field.

competitor

An individual, company, or entity that may compete for the prospect that is the target of an opportunity.

contact list

A set of contact records based on a segment definition. The list may contain all of the results returned by a query, may be part of an n-Select segment, or may be a random selection of records returned by a query.

deferred income

Unearned income liability due to revenues collected in advance that require obligations, benefits, or services to be rendered in the future before the income is realized. Typically, expenses will be incurred as the benefits or services are rendered such that the matching principle also kicks in. Examples of deferred income transactions include dues or subscription transactions in which the benefits may be realized equally over the 12-month term of the membership or subscription or an event registration in which the benefits coincide with the event date.

display order

The order that columns display in query results pages.

document

An object saved in the CORE; *for example*, a Crystal report.

driver business object

A business object that validates, at runtime, that a selected query will be able to drive an output process; *for example*, a driver business object for a Crystal report would create the required index.

End Date

Date a campaign, appeal, or solicitation officially ends.

entity

The legal financial entity for which a separate set of balanced financial accounts (or set of books) must be maintained independently. Although accounting information from different entities may be combined for consolidated reporting purposes, all transactions and accounts must be kept in balance for each entity.

external Web user

A low-level user with restricted access and privileges to enter orders and payment information and monitor the process of the shipment of the order.

filter

One or more column-specific search conditions. *For example*, to search for all contacts who live in Texas or who subscribe to an organization's journal, define a filter set that returns only those contacts either Texas or who subscribe to the journal.

fulfillment

Completion of the obligation on the part of the selling organization to supply the product or service ordered to the customer. For stock items, fulfillment coincides with physical shipment of the goods. Once the fulfillment phase of an order is completed (or partially completed when allowed), the fulfilled lines can be invoiced and, if prepaid or accrued, recognized as income or deferred income.

function

Summarizes some characteristic of the current set of rows. The functions that are available depends on the data type of the column you selected.

Note: You must select only one column when using a function. *For example*, if you want the maximum ID, ID must be the only column listed on the **Display** tab.

Avg	Returns the average of the values in the specified column. (Numeric data type only)
Count	Returns the number of rows that are in the table or that meet certain conditions. (Any data type)
Max	Returns the maximum value found in the specified column. (Character and numeric data types)
Min	Returns the minimum value found in the specified column. (Character and numeric data types)
Sum	Returns the sum of all values found in the specified column. (Numeric data type only)

Generate Output

Command that runs the output generation process.

group

A collection of users assigned the same level of access to a specific area of functionality within *iMIS*.

highest transaction amount

Maximum of all orders, gifts, and pledges attributed to one of the following:

- Source code
- All source codes within a campaign, an appeal, or a solicitation

home currency

The currency of the organization. For accounting and audit trail inquiry and reporting purposes, all amounts must be also represented in the home currency. All general ledger journal entries and all accounting-related reports must be created using the home currency amounts.

invoice interface

Accounting process that will generate the invoice header invoice lines and invoice distribution lines based on the data passed from the commerce engine or an export file.

journal entries

Transactions that record a company's financial activity through various offsetting debit and credit accounts and amounts.

message

Processed output (text) that is custom generated for a contact from a template using a letter generator.

natural currency

The currency of the customer. When the multi-currency feature is enabled, it is important that the natural currency is the primary currency focus of the transaction calculations and customer interaction.

note

Notices to internal staff that are predefined during action plan building. Notes have no timeline designation and must be marked complete to advance the action plan.

Object

Self-contained element that consists of instructions to manipulate data; *for example*, a business object or a query object.

project

An advantageous circumstance that could result in a positive action such as a purchase, registration, or donation.

Opportunity Administrator

A user who can set up and administer security and can perform module setup functions for the Opportunity Management module.

process class

A combination of standard data elements and structure that specify what data should be recorded about a project. This information can be used to guide the project to success and to analyze the success or failure of the project.

Opportunity Manager

A user who can create and manage opportunities.

Opportunity Owner

An individual or group who is assigned to an opportunity and has responsibilities to bring an opportunity to success.

opportunity source code

The marketing source code and affiliated campaign/appeal from *iMIS* Campaign Management that may have produced the opportunity.

Opportunity Type

A class or category of opportunity that has its own unique set of processes. Opportunity types include information about the Opportunity Class, the default action plan, and the default Opportunity Owner.

Opportunity User

A user who has read-only access to the Opportunity Management module.

Order Management User

A mid-level user with limited access and privileges to specific maintenance and data entry areas involving order-related tasks. Different Order Management users may have different specific privileges depending on the tasks for which they are responsible.

output device

The physical method used to view the results of an output process, for example, a computer screen, a printer, or a PDF document.

output format

The format for data resulting from an output process, for example, Excel, HTML, or MS Word.

output process

A process-oriented task, for example, a Crystal report, MS Word merge, or query

package

Content that is delivered to a prospect, such as a combination of messages and inserts, brochures, letters, and envelopes.

parameter

A user-supplied value that dynamically customizes output. A parameter can be pre-defined or can require user input at runtime.

parameterized query

A query that requires a value from the user at runtime.

payment/adjustment application

The accounting process that runs as the data is being posted. All posted transactions will be matched together (invoices, payments, and adjustments). If there are any GL entries or due-to due-from balancing lines needed to be generated, the system will generate them.

place of business

Any location at which three or more orders are received by the retailer in a calendar year.

posting

The process of submitting unposted invoice, adjustment, or payment data that converts the data to its permanent state. Once a transaction is posted, it can no longer be changed directly.

preview

Option to view output without the physical file or document being generated.

priority

The order in which the data for a particular column is sorted.

process definition

The set of runtime-specific instructions used to execute an output process.

primary contact

The target of a project. The primary contact for a project is not stored in the *iMIS* Prospect table.

primary contact list

A set of contact records based on a segment definition. The list may contain all of the results returned by a query, may be part of an n-Select segment, or may be a random selection of records returned by a query.

primary contact record

The information for an individual primary contact from a prospect list.

purge inactive

The option for deleting all inactive campaigns. Only users assigned to the CampaignAdmin group can purge inactive campaigns.

query

Criteria used to retrieve a subset of data from the *iMIS* database.

query segment

Segment populated by a query assigned to the segment. A query segment can be populated with the specified number of random records returned by the query.

record-level access

The privilege granted to access a specific instance of data, such as a contact's record or a query.

relation

The part of a query definition that specifies a relationship between two or more sources and is used to restrict the data the query returns.

role

The assignment that allows one or more users and/or groups to perform specific functions and to access specific areas of functionality within *iMIS*.

schedule order

The order in which the tax authorities should be evaluated (for tax on tax).

source

The data used to build query definitions. A source can be a business object or a query object.

stage

A step in an action plan associated with a major milestone. A stage may include tasks, notes, documents, and e-mail notifications. Project status and win probability can be updated automatically at each stage completion or manually at any time.

Start Date

Date a campaign, appeal, or solicitation officially begins.

status

Property setting for each campaign, appeal, solicitation, and source code.

synchronize responses

Option that triggers the response recognition process

Synchronous Process

A process that runs as a result of another process being completed.

system-defined groups

The groups created by default when you install *iMIS*. You can add new groups, but you cannot edit or delete system-defined groups.

system-defined roles

The roles created by default when you install *iMIS*. You can add new roles, but you cannot edit or delete system-defined roles.

target revenue

Monetary goal for each campaign and appeal (when Budget Level is set to Appeal) or for each solicitation and source code (when Budget Level is set to Source Code)

task

An action or job that is associated with a minor milestone in an action plan. Users open tasks, update them with comments, and mark them completed. Completing tasks advances the action plan.

tax authority

A jurisdiction or geographical area to which a set of specific taxing rules apply.

tax category

A user-defined group of products that have common taxation rules. *For example*, food, clothing, or shipping.

tax schedule

The tax schedule combines all the Tax Authorities that apply to a particular customer location and dictates the rates that apply per each Tax Authority/Tax Category combination. The tax schedule also determines the order in which taxes are calculated when more than one tax applies.

unearned income

A liability that arises because the business received a payment and is obligated to deliver goods, perform services, or refund the payment in the future. When the prepaid case is deposited, the payment amount should remain categorized as an unearned income liability until the accompanying order is fulfilled. Unearned income is also the account that is used for unknown or unapplied payments which are awaiting further application instructions.

update status

A value selected by the user that triggers an update to an opportunity's overall status property when the action plan stage is completed.

update win probability

The value that triggers an update to the opportunity's win probability property when the action plan stage is completed.

user

A record which has a unique login and can access the system. All users are automatically assigned to the **Everyone** role upon login.

user permission

The privilege granted to one or more users, groups, or roles for allowing and limiting access to record-level data. The user permissions for the *iMIS* system are:

- Control (full control) - Grants complete access to record-level data (read, add, edit, delete).
- Read - Grants read-only access to an instance of data.
- Add - (Applicable only to folders) Allows users to save items to the folder.
- Edit - Allows users to modify an instance of data, including child records.
- Delete - Allows users to delete an instance of data.

win probability

A percentage value indicating the likelihood that an opportunity will be won.

workflow queue

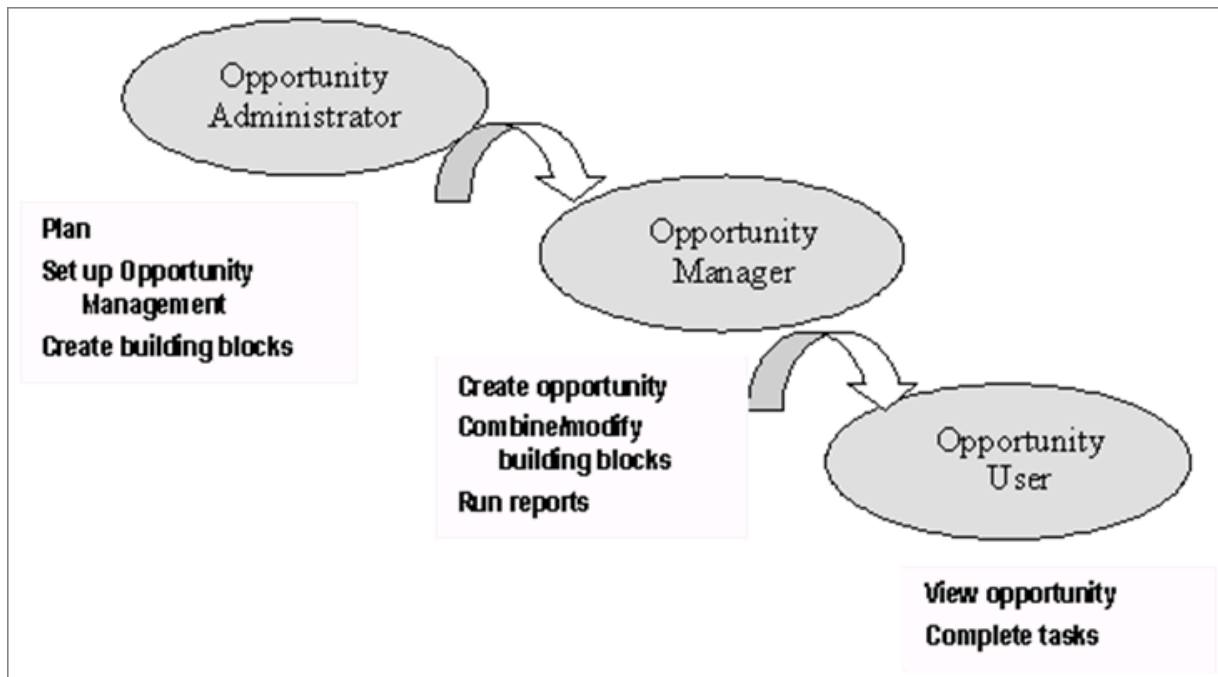
Contains the *iMIS* tasks that are currently running, waiting to be run, or that have failed.

Process Manager roles

You can assign roles to the people in your organization to manage or to view appropriate information:

- A system administrator or director might create the “building blocks” for each general type of project/opportunity in your organization.
- Managers or business analysts might be given access to create projects/opportunities and to combine and modify the “building blocks” for each specific one.

- Staff operations personnel might be allowed to view all or some projects/opportunities and to view and modify tasks that have been assigned to them.



Process Manager group roles

Using Process Manager

Process Manager can help you work more efficiently and effectively. As a Process Manager user, you have access to opportunities, tasks, and communications features that help you move potential projects to a successful win.

Using projects

A project is any circumstance that could result in a positive action for your organization, such as a purchase, donation, or registration.

Project	Tasks	Communications
<ul style="list-style-type: none"> ▪ View ▪ Define ▪ Attach a document ▪ Close 	<ul style="list-style-type: none"> ▪ View ▪ Edit 	<ul style="list-style-type: none"> ▪ Generate e-mail messages ▪ Generate MS Word documents ▪ Run reports ▪ Export Crystal reports

To view a project

There are two ways to view a project:

- Go to **Process Mgr > Process manager**.
iMIS displays all projects for which you have security access privileges.
- Go to **Customers** and open a contact record.

If you are the owner of a project, you can see the details of the project when you have a contact record open in the **Customers**. (Make sure your tab preferences are set to make the **Process Mgr** tab visible.) The **Process Mgr** tab displays the description, status, and expiration date of the project.

To define a project

The tabs along the top of the project page define general information about the project:

- The **Summary** tab displays the details of the project, the contact, and related opportunities.
- The **Definition** tab displays summary information for editing.
- The **Action Plan** tab displays the action plan assigned to the project and the status of each task.
- The **Security** tab displays security access rights for the project.

The tabs along the side of the project define detailed information about the project:

- The **Groups** tab displays the individuals associated with the project and their group roles.
- The **Tasks** tab displays required tasks, status, and notes.
- The **Documents** tab displays related documents.
- The **Activities** tab displays all activity within a prospect's record (from the Customer Portfolio).
- The **History** tab displays actions and progress in the project.

To attach a document to a project

You can attach documents that are related to the project, such as proposals and letters sent to the contact.

1. From **Process Mgr**, select **Process manager**.
2. Open the project.
3. Select **Documents**.
4. Either browse to an existing file in the Document System or create a new file type.
5. Click **Upload**.

To close a project

When you close a project, the project status changes to **Complete** and the project remains in the system for historical reporting purposes. The task history is saved with the project.

1. From **Process Mgr**, select **Process manager**.
2. Select the project.
3. Click the **Definition** tab.
4. From the **Project Status** drop-down list, select **Closed**.
5. Click **Save**.

Using tasks

Process Manager helps you manage the tasks associated with projects and opportunities. It's easy to see the tasks that are assigned to you and to prioritize your efforts to move a project to success. After you complete a task, you can mark it complete and determine whether there are other tasks needing your attention.

To view tasks

1. From **Process Mgr**, select **Process manager**.
2. Open a project.

3. Select **Tasks**.

The system displays tasks assigned to you. If you are the Opportunity Owner, the system displays all tasks for the project.

To edit tasks

If you have editing access rights, you can modify tasks, including marking them complete.

1. From **Process Mgr**, select **Process manager**.
2. From **Tasks**, select the task.
3. Enter your edits.
4. Click **Save**.

Using task communications

Your tasks may include sending messages to internal stakeholders or to prospects and producing reports. Some correspondence occurs automatically as a part of an action plan.

Note: The following procedures assume that you have already *created the relevant output process* (see "Creating output processes").

To generate email messages or MS Word merge documents

1. From **Process Mgr**, select **Generate Reports**.
2. Select the message or document.
3. Click **Run**.

To run a report

Process Manager reports use information from the *iMIS* database to present useful information to stakeholders. To access Process Manager reports, you must be assigned either to the Opportunity User group or to the Reporting group.

Standard Reports are available when you first open Process Manager. When you run a report, you might be asked to supply parameters (data required to run the report) or to choose options from a list.

To print Crystal reports (which includes both Print to Screen and Print PDF file to Screen), you must have Adobe® Reader® installed on both the server and your workstation. Go to the [Adobe](http://adobe.com) website to download the free reader software.

To cancel a print job, you must have permissions to the print server.

1. From **Process Mgr**, select **Generate reports**.
2. Select the report.
3. Enter any required **Parameters** (data required to run the report).
4. Click **Run**.
5. (optional) If you have report editing security access, specify the print destination and formatting options.
6. Click **Preview**.
7. If the results are correct, click **Run**.

If you want to increase or reduce the items that are displayed, click **Change Parameters**, make the changes, and preview again.

To change the title of a report for printing:

1. Run the report.

2. Click **Selections**.
3. Enter the new title after “Report:”.
4. Print the report.

To export a Crystal report

1. From **Process Mgr**, select **Generate reports**.
2. Open the report.
3. Select **Output**.
4. Select **Print to Screen**.
5. Enter any required **Parameters** (data required to run the report).
6. Click **Run**.
7. From the Format options, select an export format.
8. Click **Export**.

Managing projects

If you are an Opportunity Manager, Opportunity Creator, or Opportunity Administrator, you can perform the following actions, in addition to user tasks:

Opportunities

- Create
- Edit
- Delete

Communications

- Select message recipients
- Select report data
- Copy, edit, delete, and create output processes

Setting up and editing projects

If no Opportunity Owner is specified, the creator of the project becomes the default owner.

To create a project

1. From **Process Mgr**, select **Process manager**.
2. Click **Create New Process**.
3. Select a Process Type, which are created in **Process Mgr > Set up module**.
4. Define the project and identify the primary contact for the project.
5. (optional) Click the **Source Code** lookup icon to select the source code associated with the project.
6. Click **Save**.

The **Products**, **Subscription**, and **Distributions** fields can be specified by selecting values from a drop-down list, if the underlying tables have been set up:

- For Sales Opportunity types, the **Products** drop-down list is populated by the members of the **Products** table defined in **AR/Cash > Set up tables**.
- For Member Opportunity types, the **Subscription** drop-down list is populated by the **Products** defined in **Billing > Set up module** which have the Product Types of **SUB** and **DUES**.
- For Donor Opportunity types, the **Distribution** drop-down list is populated by the **Distributions and Premiums** defined in **Fundraising > Set up Tables**.

If the Primary Contact has one or more sales representatives or regional managers *associated in relationships* (see "[Determining roles and responsibilities](#)"), these people will be assigned to the project automatically. You can view the assigned salesperson and manager information by opening a project and selecting **Groups > Owner Roles**.

Note: If a solicitor is designated for the primary contact in the **Donor Data** tab of the **Customers** module, the solicitor will also be assigned to the new project.

If you need to create more relationships that create group owners automatically, you can update the string parameter "OpportunityDefaultOwnerRoles" in the SystemConfig table. The current string is: 'Salesperson!<solicitor>!SALES,Sales Manager!MB,Regional Manager!RM'. Additional relationships can be added by Adding , [Role Name]![Relationship Name] to that configuration string.

To edit a process type

You can override the default settings for a project when you create the project. If you are the Opportunity Owner, you can make changes to the project at any time. The options for editing are:

- Edit the project summary
- Change the default action plan
- Bypass a stage in the action plan
- Add tasks
- Change the task owner
- Edit project security settings
- Edit project group roles

You can add new contacts to opportunity group roles. Before a new contact is added to the database, you are notified of possible duplicates. At this point, you can continue or cancel the insert.

Contact records that are added from a project follow the same data entry standards as records added through **Customers**, except:

- The system does not consider values for the **Auto Assign Member Numbers**, **Institute Type**, and **Suppress Individual Name Fields** for Company Records fields on the **Customer Setup - Basic Options** page.
- The values for the **Major Key Prompt**, **Must be Unique**, and **Flow from ID** fields on the **Customer Setup - Basic Options** page are not relevant.
- The system does not consider whether the **Disable Auto Flow Down of Company Address Information** field on the **Customer Setup - Advanced** page is enabled.

To edit the project summary

1. From **Process Mgr**, select **Process manager**.
2. Edit the project:
 - Click the **Definition** tab to edit general project information.
 - Click the **Summary** tab in the Primary Contact area, or the **Definition** tab, and then select the primary contact's name to view or edit prospect information.
 - On the **Summary** tab, scroll to the **Related Projects** area. Select a project to edit a related project for this contact.
3. Click **Save**.

To delete a project

When you delete a project, the **Project Status** changes to **Canceled** and the project remains in the system for historical reporting purposes.

1. From **Process Mgr**, select **Process manager**.
2. For each opportunity that you want to delete, select the corresponding checkbox.
3. Click **delete selected**.

Editing action plans

To replace the action plan

The project owner can replace the action plan for an active project at any time. All completed tasks, notes, and email notifications are preserved in the project history.

1. From **Process Mgr**, select **Process manager**.
2. Select the project.
3. Click the **Action Plan** tab.
4. Next to **Replace Action Plan With** select the desired action plan.
5. Click **Change Action Plan**.
6. Click **Save**.

To bypass a stage in the action plan

The project owner can easily bypass any intermediate stage in the action plan, if that stage has become irrelevant to the completion of the action plan. When you bypass a stage in the action plan:

- The next stage starts.
 - All incomplete (or never begun) tasks, notes, and e-mail notifications from the bypassed stage are marked with a **Cancelled** status.
1. From **Process Mgr**, select **Process manager**.
 2. Select the project.
 3. Click the **Action Plan** tab.
 4. Next to **Current Stage**, select the desired current stage.
 5. From the **Update Previous Stages Status** list, select the status of the stage to be bypassed.
 6. Click **Change Current Stage**.
 7. Click **Save**.

To add tasks

1. From **Process Mgr**, select **Process manager**.
2. Select the project.
3. Click the **Action Plan** tab.
4. Click **Add New**. Complete the task information.
5. Click **Save**.

The new task appears on the task list.

To change the task owner

If you have access privileges, you can change the owner of a task to any Opportunity Owner who has a defined user record.

1. From **Process Mgr**, select **Tasks**.
2. Enter the search criteria and click **Filter**.
3. Select the task and open it.
4. Next to Assignee, select the browse button to find a new person whom you want to assign as the new task owner.
5. Click **Save**.
6. Close the **Task Viewer** window.

The original task window shows that the task is assigned to this owner. The task appears in the new owner's task list.

Editing security settings and roles

To edit project security settings

Project security settings specify the access rights of participants.

1. From **Process Mgr**, select **Process manager**.
2. Select the project.
3. Click **Security**.
4. Select the desired access rights:
 - ☐ Select **Share (Everyone)** to grant full control to all users.
 - ☐ Select **Private** to grant full access to the Opportunity Owner and those assigned to perform tasks for the project.
 - ☐ Select **Advanced** to choose one of the pre-defined access settings or to select custom settings.
5. From the **Access Mode** drop-down list, select the desired mode.
6. (optional) Select a group role to add to the **Current Access** list.
7. (optional) Click the **Edit** icon to edit the permissions of the group role.
Click **OK**.
8. Click **Save**.

To edit project group roles

Project group roles describe the responsibilities of participants.

1. From **Process Mgr**, select **Process manager**.
2. Select the project.
3. Select **Groups**.
4. From the drop-down list, select the group role name (Contacts, Owners, Competitors if enabled, others).
5. Click **Edit Role Members**.
6. From the **Select From** list, select a view.
7. Select the member to add to the **Current Members** list.
8. (optional) Add a new member:
 - ☐ Click **Add New**.
 - ☐ Enter the information.

- Click **Save**.

9. Click **Save**.

To edit project types

If the default project types are similar to those your organization uses, you can simply change the default properties. Changes to process type definitions are not retroactive to existing projects.

Managing project communications

Process Manager gives you the power to manage effective communications with your prospects and within your organization. As an Opportunity Manager or Opportunity Administrator, you can:

- Use queries to select message recipients
- Use queries to specify report data
- Edit, copy, or delete output processes that specify reporting, email, or Word merge processes

Note: The following procedures assume that you have already *created the relevant output process* (see "Creating output processes").

To select message recipients or report data

Run a predefined query to select the recipients for a message or the data elements for a report.

1. From **Process Mgr**, select **Generate reports**.
2. Select **QueriesView**. Select the query.
3. (optional) Enter your changes to the sources, filters, display, and sorting information. Click **Save** or **Save As** and save the edited query.
4. Enter any required parameters (information needed to run the query).
5. Click **Preview**.
6. If the results are correct, click **Run**.

If you want to increase or reduce the items that are displayed, click **Change Parameters**, make the changes, and preview again.

To edit an output process

1. From **Process Mgr**, select **Generate reports**.
2. Select the output process.
3. Click the **Edit** icon and enter your changes.
4. Click **Save**.

To copy an output process

1. From **Process Mgr**, select **Generate reports**.
2. Select the output process.
3. Click the **Edit** icon.
4. Click **Save As**.
5. Enter a name for the new output process.
6. Define the new output process.
7. Click **Save**.

To delete an output process

1. From **Process Mgr**, select **Generate reports**.
2. Select the output process.
3. Click **Delete**.

Administering Process Manager

The Opportunity Administrator performs module set up tasks:

- *Planning the implementation*

This critical step can be completed with stakeholders throughout your organization. Thorough planning will result in a shorter startup time and a more effective tool for users.

- *Installing Process Manager*

The administrator creates the “building blocks”, including action plans, group roles, queries, and reports, for users to apply and modify.

- *Tailoring Process Manager*

The administrator adds or modifies attributes to meet the unique requirements of your organization.

Planning the Implementation

The success of your Process Manager installation lies in the planning. By planning carefully, you can make sure Process Manager helps your staff work efficiently and effectively. The planning step is the most important part of the implementation, resulting in:

- A smooth startup
- Correct security access to sensitive data
- Appropriate processes for each prospect and situation
- Useful communications and reporting

The planning process

Use the following strategy to plan your Process Manager implementation:

1. Identify the general types of projects your organization encounters and what is unique about each type.
2. Determine the specific roles and responsibilities required for each project type.
3. Build action plans that embody the best practices of your organization, including communications and reporting needs.

Tips for implementation planning

- Focus on building relationships, not on data entry.
- Clearly identify your prospect/donor types and the different methods your organization will use to build relationships with each group.
- Draw a map of the players involved. Note the communications and reporting needs of each player.
- Consider how you will process a “won” opportunity. Build the handoff into your plan and be sure the transactions that are generated (orders, events, donations) will be handled correctly.

- Establish naming conventions to help organize projects, documents, and reports. A unique prefix for each department might be appropriate for your organization.

Identifying Process types

By defining one or more process types, the Opportunity Administrator provides templates for Opportunity Managers to create new opportunities quickly. You can create a process type for each action plan, for each type of prospect, for specific reporting requirements, or whatever criteria best meets the needs of your organization.

Process type concepts and terms

A process type is a category of projects that has a unique set of processes. Process types include information about:

- **Default action plan**
The action plan most often used for this process type
- **Default owner**
The most likely owner of this process type
- **Opportunity Class**
A combination of standard data elements and structure that specify what data should be recorded about the opportunity.
- **Default Opportunity Classes (Donor, Member, Sales)** are provided in *iMIS*. You can build additional Opportunity Classes that meet the unique needs of your organization.

Tips for planning process types

- Structure process types to optimize the time it takes to set up data entry and reporting for an opportunity. You might create a process type based on geography or type of prospect, for example.
- Create a new process type when you need a new strategy to develop a new prospect group or when data entry and reporting needs are very different for different areas or prospects.

Process types example: Non-profit organization

In this example, our non-profit organization has current members and donors. In addition, non-members purchase conference proceedings and books. The default process types are sufficient for our process.

Process Type	Default Action Plan	Default Owner
Donor	Donor Giving	Director of Fundraising
Member	Annual Conference	Director of Events
Sales	Publications	Director of Publications

Attaching document templates to a process type

You can attach multiple document templates to a process type. Each new project created from the project type contains its own unique copy of the attached documents, which you can edit as needed for the project.

Note: You can attach only documents that are locally saved on your computer. For this procedure, do not attempt to specify documents that are located in *iMIS* folders.

To attach document templates to a project type

1. Ensure that the documents to be used as templates for the project type are locally saved on your computer.

2. From **Process Manager**, select **Set up Module**.
3. On the **Process Types** tab, select a project type (or create a new project type by clicking **Create Process Type**).
4. Click the **Documents** tab.
5. Select **New** and select the type of file that you want to upload.
6. Click **Browse**.

The **Choose File** window appears.

7. Browse to the file that you want to upload and click **Open**.

Note: If the file **Type** that you chose does not match the file extension (for example, **.doc** for an **MS Word Document**), the upload will fail.

8. (*optional*) In the **Description** field, enter a short description of the document template.
9. Click **Upload**.
The uploaded document is listed in the project page.
10. Repeat this process for every document template that you want to attach to this process type.
11. Click **Save**.

Determining roles and responsibilities

Identify the participants who will be involved in the life of a project. Understanding the different roles and responsibilities gives you the information you need to set up security, data collection, and reporting for the module.

The roles you will set up for Process Manager are:

- Project security roles, which govern access and control
- Project group roles, which specify responsibilities

Project security roles

Assign each participant to one of the security roles specific to Process Manager:

- Opportunity Administrator
A user who sets up and tailors Process Manager.
- Opportunity Manager
A user who creates projects and specifies owners, action plans, and tasks. A person with this role has full control over projects created by anyone else.
- Opportunity Creator
A user who creates projects and has full control over projects that they create, but has no access to projects created by anyone else.
- Opportunity User
A user who has read-only access to projects.

Project group roles

When creating projects, you assign each participant to one of these general roles provided by the system:

- Primary Contact
The target person to be contacted for the successful outcome of a project.

- Opportunity Owners

The group of users who are *eligible* to be Opportunity Owners (responsible for a project's success). A user must be a member of this pool in order to be assigned as owner to any individual project.

- Contact

A participant who is associated with the project, but does not necessarily own its ultimate success.

- Competitor

A company, or entity that may compete with the organization for the project. Typically this role is only used for sales business scenarios and not for fundraising or membership drives.

If you need more specific roles, you can assign each participant in a group to a descriptive role or roles. For example, the Opportunity Owners group might include:

- Sales Directors and Sales Representatives

- VP of Major Gifts and Major Gift Managers

Or they might include other job titles specific to your organization, for which you would need to create project group roles. These roles are custom roles you create using Process Manager.

You can automatically create group owners for projects using relationships. If you set up a SALES or RM (Regional Manager) relationship for a project's primary contact, they are automatically group owners. Owners belong to a security group that can gain access to certain areas based on how you set them up to access the system.

Another relationship creates a project owner, the MB (Managed By) group also creates a Sales Manager group owner. If you need to create more relationships that create group owners automatically, you can update the string parameter "OpportunityDefaultOwnerRoles" in the SystemConfig table. The current string is: 'Salesperson!<solicitor>!SALES,Sales Manager!MB,Regional Manager!RM'. Additional relationships can be added by Adding , [Role Name]![Relationship Name] to that configuration string.

Associating personnel with prospects

Before *iMIS* can associate personnel with new projects based on the designated prospect, you must set up customer relationships in *iMIS*, which consists of two steps:

1. Set up sales and management relationship types.
2. Associate sales persons or managers with prospects.

To set up sales and management relationship types

1. From **Customers**, select **Set up tables > Relationship types**.
2. Check **Current Relationship Types** and ensure that the following codes are defined:
 - **Code:** SALES **Description:** Sales Person
 - **Code:** RM **Description:** Regional Manager

To associate sales persons or managers with a prospect

1. From **Customers**, click the **Relationships** tab in the history area.
2. For each sales person or manager:
 - On the **Relationships** tab, click **New**.
The **Relationship Detail** window appears.
 - Click **New** to enter edit mode.
 - Enter the **ID** of the person you want to associate.

- ☐ Enter the code for the **Relationship** (SALES or RM).
- ☐ Click **Save**.

Tip for planning roles and responsibilities

Make sure all personnel who are eligible to be the owner of a project are included in the Opportunity Owners group. Future additions must be done by the Administrator, not by Opportunity Managers, Opportunity Creators, or Opportunity Owners.

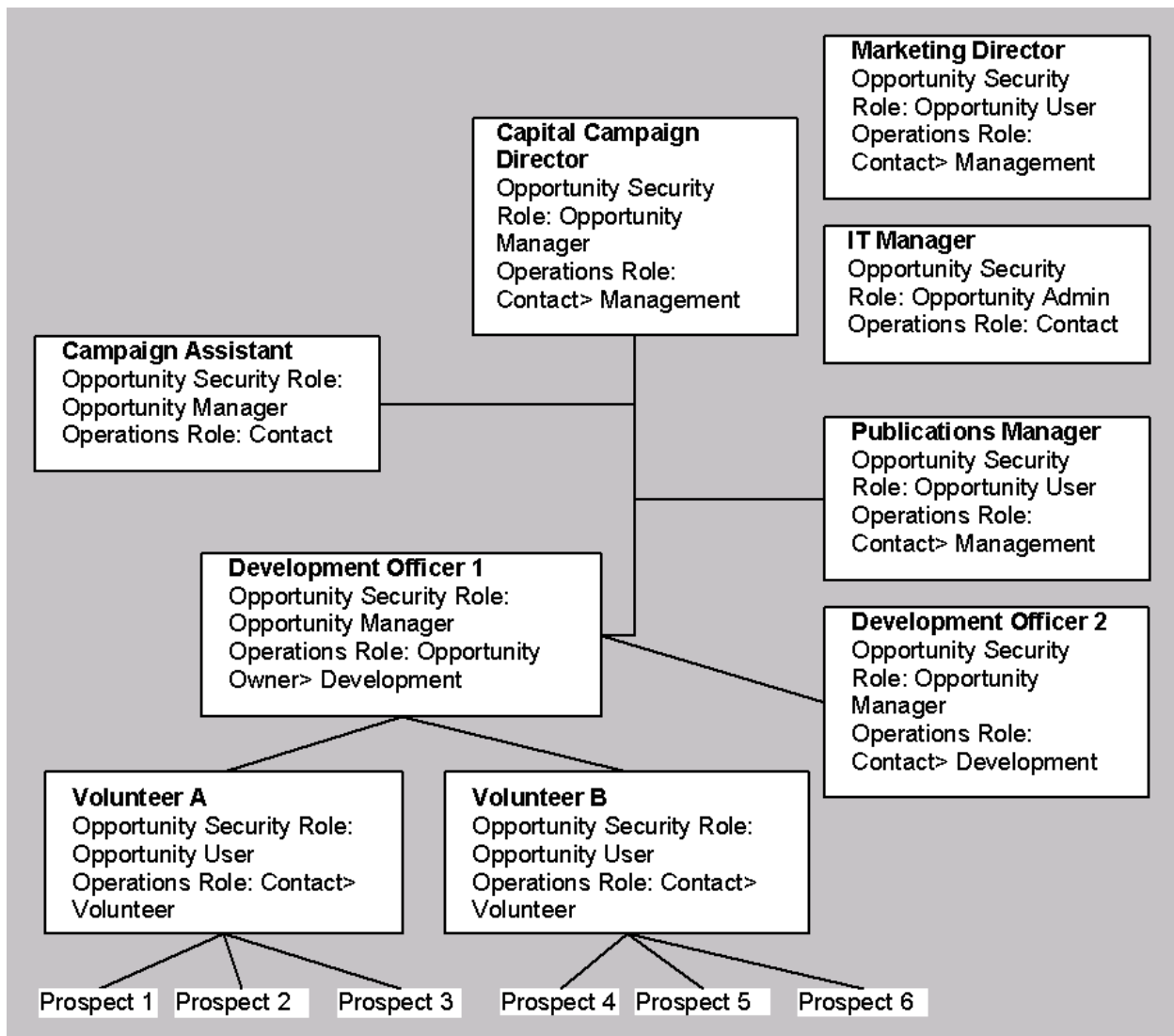
Roles examples

The following examples show how you might set up roles and responsibilities within Process Manager for your organization.

Roles example: A capital campaign drive

After the IT Manager sets up the Process Manager system, the Capital Campaign Director identifies new projects and assigns Development Officer #1 to be the owner of the new project. The Development Officer communicates with prospects and contacts. The Campaign Assistant creates projects when the Campaign Director is out of the office and provides reports to upper management.

Based on this scenario, the following project security roles and project group roles are assigned to the participants:



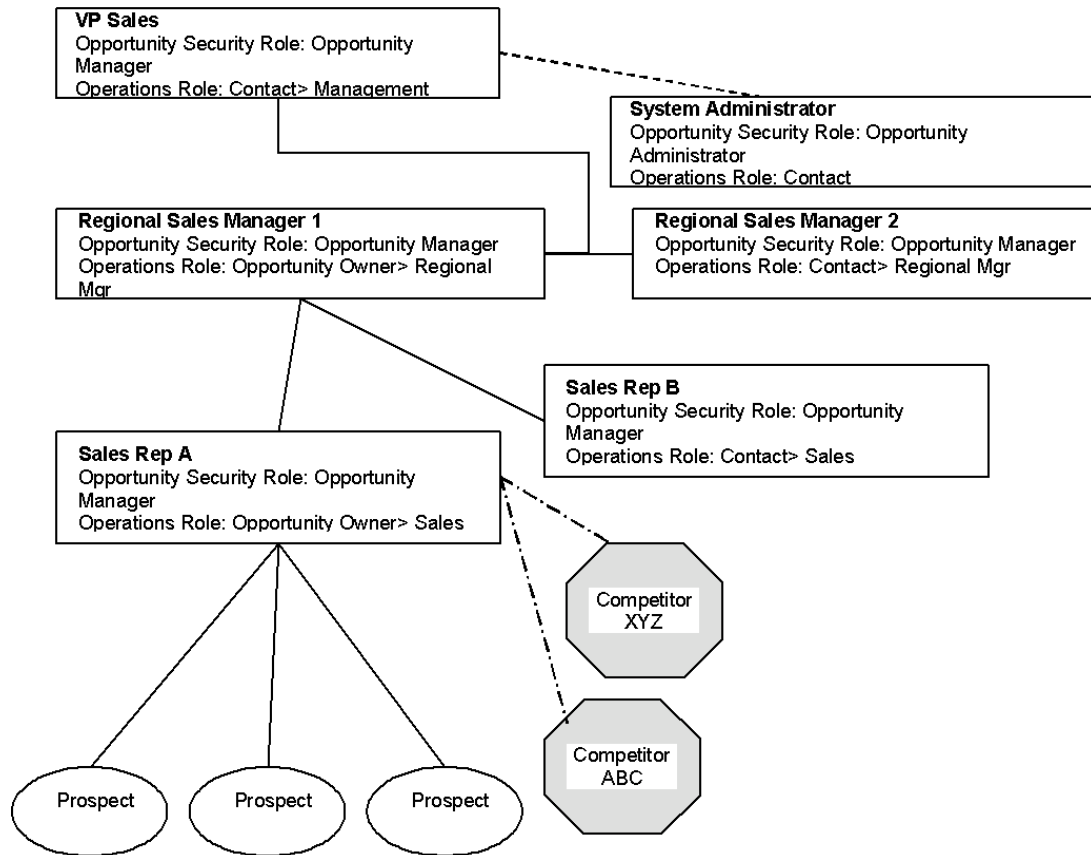
Example roles for a capital campaign drive

The communications and reporting needs for these roles might include:

Role	Communication Needs
Capital Campaign Director	Opportunity Forecast Donor report
Campaign Assistant	(Runs all reports)
Publications Manager	E-mail notification of project status
Development Officers	Opportunity Profile E-mail notification of project status
Volunteers	E-mail training materials Task report
Prospects	Mail brochure E-mail promotion information

Roles example: A sales department

In this example, the System Administrator sets up the module. The VP Sales assigns projects by region. The Regional Sales Manager #1 and Sales Rep A are both responsible for the success of the project (Opportunity Owners) but play different roles in the process. Contacts are other Sales Managers. There are two Competitors in this example.



Example roles for a sales department

The communications and reporting needs for these roles might include:

Role	Communication Needs
VP Sales	Won or Lost Opportunity Analysis
Regional Sales Managers	Won or Lost Opportunity Analysis E-mail notification of project status
Sales Reps	Opportunity Profile Task List
Prospects	Mail brochure E-mail promotion information

Building action plans

Action plans are a workflow management tool. The Opportunity Administrator defines one or more default action plans that are available to Opportunity Managers. The managers create new projects, choosing from the default action plans and modifying them, if necessary, for the unique situation.

Concepts for action plans

- **Action plans** - Pre-defined tasks that take place in a certain order and in a specific time frame. Action plans are made up of stages. Stages contain tasks, notes, and email notifications.
 - **Stage** - A major milestone in the project. A stage may include tasks, notes, and email notifications. Project status and win probability can be updated automatically at each stage completion, or manually at any time.
 - **Task** - A minor milestone in the project. Users open tasks, update them with comments, and mark them completed. Completing tasks advances the action plan as long as all notes are completed for the task.
 - **Notes** - Notices to internal staff that are predefined when creating an action plan. Notes have no time line designation and must be marked complete to advance the action plan.
 - **Email notification** - Email messages are sent to the designated owners at the start of a stage, so if you want Process Manager to send an email message when stage 2 is complete, then put the email notification at the beginning of stage 3.

Action plans advance by:

- The completion of all tasks and notes within a stage.
- Manual intervention to change the action plan or to bypass one or more tasks/stages.

An action plan stage that lacks at least one task or one note does not advance to the next stage. Therefore, you should attach at least one task or one note to each stage so that the action plan continues to advance. This design means that the action plan defines “best practice” and enables users to work within that best practice for the needs of the prospect.

The Tools console

The **Tools** console is your centralized administration tool for these tailoring functions. Use **Tools** to:

- Set up queries, reports and output processes
- Manage system-wide security
- Set up *iMIS* modules

The Intelligent Query Architect (IQA) simplifies data access for reports, mailings, and letter merges. The user interface makes it easy for a user with limited SQL experience to perform SQL-like query building tasks. The queries created in IQA use business objects and other queries as data sources to best represent the database schema in a context that is meaningful to your organization.

The Document System is a server-side file system that gives you the power to set up a structure for queries, reports, processes, and templates. In addition, you can add process engines that define business processes, such as adding new opportunities automatically based on specific criteria.

Tips for developing action plans

- Notifications can be sent at the end of each stage, so make your stages large enough that stakeholders are not inundated with minor notifications.
- Make sure each task serves a purpose. Be realistic about task due dates.
- Use notes carefully. They are an excellent instructional tool, but action plans cannot be advanced until the note is marked complete.
- Discuss what events might require an alternate plan: fast track, bypass a stage, stop the action plan.
- Determine industry standards and use those as your guide.

Action plan example: Sales action plan

This example shows a possible action plan for selling a new product to existing customers. First, we define the stages of the plan:

Stage	Description	Win Probability	Change Status to
Qualification	Process to qualify prospect	0%	Relationship Building
Relationship Building	Calls and customer visit	0%	IT Briefing
IT Briefing	Customer visit	25%	Custom Demonstration
Custom Demonstration	Present a customized demo to staff	25%	Executive Meeting
Executive Meeting	Address executive issues	25%	Web Strategy Meeting
Web Strategy Meeting	Present web strategy	25%	Competitive Review
Competitive Review	Review and discuss product vs. competition	50%	Proposal Presentation
Proposal Presentation	Prepare and present proposal	75%	Contracting Process
Contracting Process	Confirmation of award	100%	Complete

Next, we define the tasks for each stage:

Stage	Task	Description	Owner	Day	Duration
Qualification	Initial Overview Meeting	Review of Information Process	Sales Manager	0	1
	Prospect Profile	Complete profile	Sales Rep	0	1
	Evaluation Plan	Complete and distribute plan	Sales Manager	1	1
	Process Signoff	Letter confirming mutual interest.	Sales Manager	2	1
Relationship Building	Questionnaire	Call prospect and ask questions about organization needs	Sales Rep	3	1
	Pre-demo Survey	Complete survey	Application Engineer	4	1
	Pre-meeting Checklist	Complete checklist	Sales Rep	4	1
	Customer Visit	Local on-site customer visit	Sales Rep	5	1
IT Briefing	IT Preparation	Prepare for IT briefing	Product Manager	7	2
	IT Briefing	IT and Product Management briefing Present Buy or Build concept	Product Manager	9	1
Custom Demonstration	Prepare Demo	Customize demo to prospect	Sales Rep	10	2
	Custom Demo Meeting	Present solution to staff	Sales Rep	12	1
Executive Meeting	White paper	Present white paper to execs	Sales Manager	14	1
	Executive Briefing	Meet with executives	Sales Manager	16	1
Web Strategy Meeting	Prepare Web Strategy	Prepare presentation for meeting	Sales Rep	12	2
	Web Meeting	Present web strategy to staff + IT	Sales Rep	14	1
Competitive Review	Competitive Review	Read recent competitive information Prepare for discussion	Sales Rep	13	1

Stage	Task	Description	Owner	Day	Duration
	Competitive Meeting	Meet with decision maker to discuss advantages of product	Sales Rep	14	1
Proposal Presentation	ROI Analysis	Prepare analysis	Sales Rep	17	1
	Proposal Prep	Prepare proposal	Sales Rep	15	3
	Proposal Presentation Prep	Prepare presentation	Sales Rep	17	1
	Proposal Review	Onsite proposal review meeting	Sales Rep	18	1
	Proposal Follow-up	Answer outstanding questions, contact participants	Sales Rep	19	3
Contracting Process	Legal Review	Prepare legal documents	Counsel	17	2
	Win	Confirmation and signing of documents	Sales Rep	22	1

Mapping action plans

Mapping out the action plans for your organization before you implement Process Manager helps you build action plans quickly and correctly.

1. Interview stakeholders to determine what processes your organization uses and what are considered “best practices.”
2. For each action plan, map out the stages (high-level view) of the process. Specify the win probability for each stage and the change in project status when each stage is complete.
3. Plan the detailed tasks within each stage. Assign relative start dates and the duration of each task.
4. Determine if notes should be attached to tasks. Be aware that notes are not included in the task list and must be accessed separately.

Process Manager: Set up module

Before implementing Process Manager, make sure you have completed all the planning steps recommended. You must have Process Manager or System Administrator privileges to set up Process Manager.

We highly recommend that you build a prototype first in a test environment and later in a live environment. This gives you the opportunity to check that all test examples (role members, security groups, process engines, and users) have been removed from the system before going live.

To implement Process Manager, you will:

1. Assign users to project security roles.
2. Create or edit process types, if needed.
3. Create default action plans.
4. Set up output processes and reports.

Setting up security for Process Manager

When a new project type is defined, the **Grant Project Access** list for the project type automatically contains every *iMIS* user who is a member of the following security groups at the time of creation:

- **OpportunityAdmin** – Sets up and tailors Process Manager.
- **OpportunityMgr** – Creates projects and specifies owners, action plans, and tasks. A person with this role has full control over projects created by anyone else.

- **OpportunityCreators** – Creates projects and has full control over projects that they create, but has no access to projects created by anyone else.
- **OpportunityOwners** – Edits only assigned projects.
- **OpportunityUsers** – Has read-only access to projects.

When a new project type is defined, the **Grant Project Access** list for the project type automatically contains every *iMIS* user who is a member of the first four Opportunity security groups at the time of creation. Similarly, if you define a new user record and assign the new user to one of these security groups, that user is automatically added to the **Grant Project Access** list for every existing project type.

Project administrators can restrict each project type to a specific **Grant Project Access** list of users who have permission to create projects from that type. This allows for one type of process (such as Sales or Major Gift) to be secured from users who manage events or review grant proposals.

To assign users to project security-related groups

Project security-related groups specify levels of access and control for individual projects.

Before you begin

All users must have an individual contact record in **Customers**, an email address in their contact record, and an up-to-date user record and password in their authentication record.

1. From **Process Mgr**, select **Set up module**.
2. Click the **Security Groups** tab.
3. Select the *security-related group* (see "[Determining roles and responsibilities](#)").
4. Select each user to be added to the group.

The user's name appears in the Current Members list.

5. Click **Save**.

Creating and editing process types

Use the *process types* (see "[Identifying Process types](#)") feature to efficiently set up similar types of projects. You can create a process type for each action plan, for each type of prospect, for specific reporting requirements, or whatever criteria best meets the needs of your organization.

To create process types

1. From **Process Mgr**, select **Set up module**.
2. In the **Process Types** tab, click **Create Process Type**.
3. Define the process type:
 - ☐ Enter the **Name** and **Description** of the process type.
 - ☐ Select the **Process Class** and **Default Action Plan**.
 - ☐ Browse to select the **Default Owner** for this process type. The default owner must be a member of the Opportunity Owners group.
 - ☐ (optional) Enter or select the default **Owners Roles** and **Contacts Roles**.
 - ☐ (optional) Enable the **Allow Competitor References** option.
 - ☐ Click the browse icon to **Grant Project Access**:
 - In the **Groups Properties** window, enter the **Name** and **Description**.
 - Select or **Add** members to the group.

- Click **Save**.

4. Click **Save**.

The Setup Groups page

To edit groups for use in the **Owner Roles** and **Contact Roles** assignments, select **Process Mgr > Set up module**, select an existing **Process Type**, then click the browse button next to **Grant Project Access**. Groups are created when you create a new **Process Type**. From the **Grant Project Access** window, you can add or remove group members.

Creating multiple projects

As an Administrator, you can configure an output process to create multiple projects so that it creates a project for each primary contact identified by a query associated with the project process output. For example, you might want to identify contacts who respond to an initial request and, therefore, warrant additional one-on-one marketing efforts.

A Process Manager Administrator can create multiple projects by defining, editing, or selecting a query and an project process output. If you are licensed for Campaign Management, you can also associate a source code with the projects.

To create multiple projects from Process Manager

1. Select **Process Mgr > Set up module** and click the **Project Process Outputs** tab.
2. Select **New Object > Project Process Outputs**.
3. Use **Save As...** to copy an output process or create a new one:
 - Click **New Object**.
 - Select the **Definition** tab.
 - Enter the **Name** and (optional) **Description**.
 - From the dropdown list, select the **Process Type**.
4. Browse to select the **Query**.
5. (optional) If you are licensed for Campaign Management, browse to select the **Source Code**.
6. Click **Save** and select the location or use the default location.
7. Click **OK**.
8. Click **Run**.

A message displays noting that the process has been submitted or indicating an error.

A new project is automatically generated for each primary or key contact identified by the query.

Every time you run the output process, it generates projects. To avoid creating duplicate projects, be careful not to run the same query and the same project process output engine more than once, or, ensure that your query is excluding already opened projects.

About defining action plans

Opportunity Administrators can define one or more default action plans that are available to Opportunity Managers. The managers create new projects, choosing from the available action plans and modifying the plans, if necessary, for the unique situation.

If you want to provide the option of creating projects with no action plan, define an empty action plan named "None."

Action plans are made up of stages (major milestones) which are made up of tasks (minor milestones), email merges, and notes. Action plans are defined with the following workflow:

1. Define the action plan.
2. Define stages for the action plan.
3. Add tasks to the stages.
4. Optionally, add notes to the stages.
5. Optionally, add email notification to the stages.
6. Save the action plan and use it to mark progress through each stage.

Copying action plans

You can save a copy of an action plan, change its title, and modify the copy.

Note: You must select new assignees if you change the action plan's related process type, because the list of available assignees for tasks and email notices is based on the related process type. Each time you change an action plan's process type and click **Save**, the assignee lists are cleared and must be reassigned.

To save a copy of an action plan

1. From **Process Mgr**, select **Set up module**.
2. On the **Action Plans** tab, select the action plan that you want to copy.
3. Click **Save as**.
A new copy of the action plan is created with the name **Copy of [original Action Plan]**.
4. Change the name and description of the new action plan.
5. (*optional*) From the process type drop-down list, choose a different process type.

Note: Change the process type before you save the copy of the action plan.

6. Click **Save**.

Note: You must click **Save** to set the related process type before you specify assignees, because the list of available assignees is based on the related process type.

7. If you changed the action plan's process type, check the **Assignee** list for every task and email notification in the action plan to ensure that a valid assignee from the new process type is assigned.
8. Click **Save**.

Setting up reports and output processes

iMIS Reports and Output Processes tools give you the power to optimize communications within your organization and with outside contacts. The output processes use the current iMIS database and can be exported to a variety of output formats. Use the Reports and Output Processes tools to:

- Create and manage custom business data
- Use queries and business objects to generate output
- Customize reports
- Assign folder and document security

Your *iMIS* administrator and users with the proper *security roles* (see "Security Administration") can create template reports and output processes (see "Reports and Output Processes"). After these are built, your staff can use these to generate reports and email messages, send MS Word letters to contacts, and export data to Excel spreadsheets or other analysis tools without detailed knowledge of database structure or report configuration.

Email merge fields for projects

Three read-only reporting business objects allow you to include the current opportunity, prospect, and assignees in an email merge output process (see "Defining output processes"):

- OppDonorContact
- OppMemberContact
- OppSalesContact

You can use fields from these objects in an email template and its corresponding selection query. Make sure to use the tablename.fieldname format (**OppSalesContact.ProspectName**), not the view name format (**vBoOppSalesContact.ProspectName**).

To allow the user to link directly to the opportunity from the email they receive, include the following link code.

```
http://{webserver}/iMIS/Admin/iMIS.web.ProcessMgr.Processmanagement/iMIS/ContentManagement/Template.aspx?ContentCode=OM.OpportunityList.?hkey=[OppDonorContact.Project Key]
```

where {webserver} is the name of the .NET server

OppDonorContact may be OppDonorContact, OppSalesContact, OppMemberContact

Output process example: email message

The following example is a simple new opportunity email notification to the Opportunity Owner.

```
Dear [OppSalesContact.Name],
The [OppSalesContact.OpportunityId] opportunity has been assigned to you.
The prospect's name is [OppSalesContact.ProspectName].
```

Customizing Process Manager

You can customize Process Manager to best meet the needs of your organization and your users:

- Create and edit query results displays
- Modify security settings

Please contact your Authorized *iMIS* Solution Provider for information on adding and modifying attributes for further customizing of Process Manager.

Editing query result displays

Use IQA to create and edit queries that filter and sort data from the *iMIS* database. Then, edit the results displays to best meet the needs of your users.

Query results displays are identified by a green background color for headings. The following folders contain queries used by Process Manager that are appropriate for editing. Folders not listed contain system files and we recommend that you do not edit those queries.

Folder	Path to Display	Possible Additions to Displays
ActionPlanList	Tools > Intelligent query architect > Default System > ActionPlanList	

Folder	Path to Display	Possible Additions to Displays
ActivityList	Select a project > Activities Menu view	
AllOppTaskList	Process Mgr > Tasks menu	Overdue tasks Upcoming task due dates Comment field on task display
OpportunityTaskList	Process Mgr > Tasks menu	Opportunities with upcoming tasks Opportunities with overdue tasks Contains the same queries as AllOppTaskList, but OpportunityTaskList involves tasks for a particular Opportunity rather than all Opportunities
HistoryList	Open a project > History menu	
OpportunityList	Main Process Manager window	Projects with overdue tasks Project task due dates
OpportunityTypeList	Set Up Module > Process Types	
RelatedOpportunityList	Select a project > Summary > Related Projects	Related opportunities in the primary contact's organization Related opportunities in the Relationships tab in Customers

To edit a query results display

1. From **Tools**, select **Intelligent query architect**.
2. Select **OpportunityManagement > Default System > Queries**.
3. Select the query.
4. Click the **Display** tab.
5. From the **View** drop-down list, select the desired view.
6. Select the check boxes of the properties to be displayed.
7. From the **Order** drop-down list, select the order the properties are to be displayed (left-to-right).
8. (optional) Assign an alias (label name) to any property.
9. Click **Save**.

To create a query results display

1. From **Tools**, select **Intelligent query architect**.
2. Select **OpportunityManagement > Default System > Queries**.
3. Click **New**.
4. Select the sources for the query:
 - ☐ Select the desired business objects. See the lists below for reference.
 - ☐ Define the relationships between the business objects.
5. Define the filtering rules.
6. Define the columns to be displayed in the output:
 - ☐ Click the **Display** tab.
 - ☐ From the **View** drop-down list, select the desired view.

- ☐ Select the check boxes of the properties to be displayed.
- ☐ From the **Order** drop-down list, select the order the properties are to be displayed (left-to-right).

7. Save the query in the appropriate folder.

Business Objects for Opportunities

- Opportunity.OpportunityDonor by Opportunity.ID
- Opportunity.OpportunityMember by Opportunity.ID
- Opportunity.OpportunitySales by Opportunity.ID

Primary Joins for Opportunities

- OpportunityType by Opportunity.OpportunityType = OpportunityType.UniformKey
- Contact by Opportunity.ProspectKey = Contact.UniformKey
- TaskItem.UniformKey = Opportunity.ParentUniformKey

Query example: Upcoming tasks display

This example shows how to define a query to display upcoming tasks for a specific Opportunity Owner on their home page.

1. From **Tools**, select **Intelligent query architect**.
2. Select **OpportunityManagement > Default System > Queries**.
3. Click **New**.
4. Select the sources for the query:
 - ☐ Select the desired business objects:
 - TaskItem
 - GroupMemberSummary
 - User
 - OpportunitySales
 - Opportunity
 - ☐ Define the relationships between the business objects:
 - TaskItem.AssignedToKey = GroupMemberSummary.GroupKey
 - GroupMemberSummary.UserKey = User.UniformKey
 - GroupMemberSummary.GroupKey = OpportunitySales.OwnerGroupKey
 - OpportunitySales.OpportunityId = Opportunity.Opportunity.Id
5. Define the filtering rules:
 - ☐ Select **Filters**.
 - ☐ Select **Mode: Advanced**.
 - ☐ Select **Property: User.Login**.
 - ☐ Select **Comparison: Equal**.

- Enter “Marc Risse” for the **Value**.
- 6. Add the first filter.
 - Select **Property: TaskItem.Completed On**.
 - Select **Comparison: Empty**.
- 7. Add the second filter.
 - Select **Property: Opportunity.Status**.
 - Select **Comparison: Not Equal**.
 - Select **Value: Closed**.
- 8. Define the columns to display in the output:
 - Click the **Display** tab.
 - Select the following columns and order:

```

Opportunity.Uniform_Key
Alias: key_Uniformkey (Order 1)
OpportunitySales.Opportunity Id (Order 2)
OpportunitySales.Description (Order 3)
TaskItem.StartDate (Order 4)
TaskItem.Category (Order 5)
TaskItem.Due Date (Order 6)
TaskItem.Subject (Order 7)
TaskItem.Priority (Order 8)
OpportunitySales.Quality (Order 9)
OpportunitySales.WinProbability (Order 10)

```

- 9. Click **Save As** and save the query in the Task List folder (**Tasks > Default System > Queries > TaskList**).

Customizing objects for Opportunities

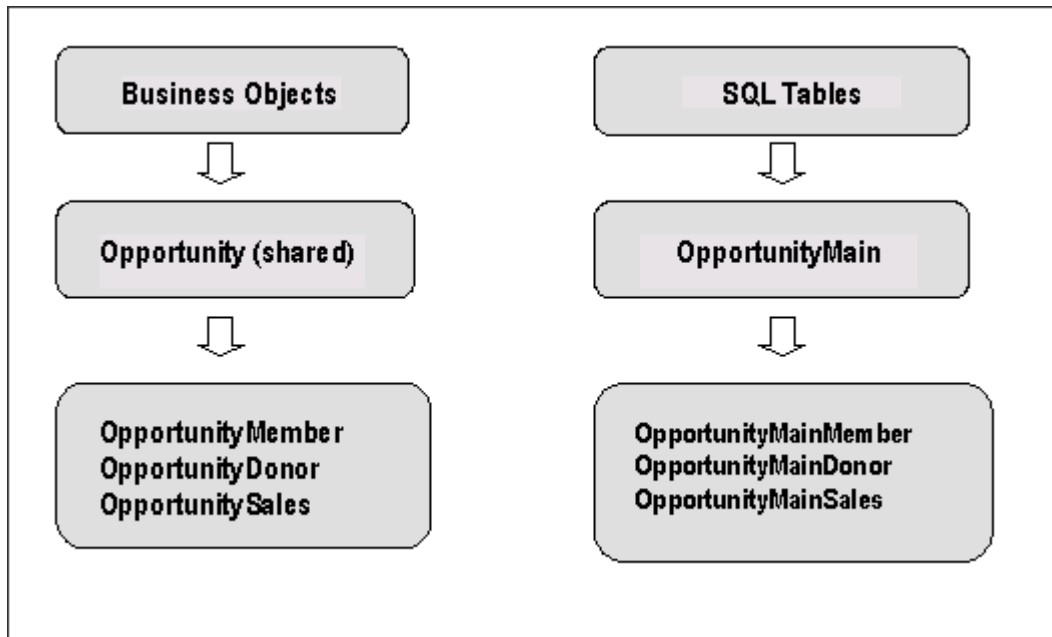
To customize Opportunities, you may need to build new business objects or edit existing ones. These business objects are used to create queries, generate reports, and run processes.

Building new Opportunity Classes

Opportunity Classes combine standard data elements and structure to define data collection and reporting requirements. These are the default Opportunity Classes supplied with Process Manager:

Opportunity Class	Data to be Collected
Common to all	Description, Expiration Date, Status, Created On, Updated On, ID, Current Action Plan Stage, Win Probability
Donor	Common plus Decision Date, Distribution, Quality, Response Media, Timing Probability, Actual, Potential
Member	Common plus Decision Date, Quality, Response Media, Subscription, Units, Timing Probability, Actual, Potential
Sales	Common plus Decision Date, Product, Quality, Response Media, Units, Timing Probability, Actual Sales, Potential Sales

You can create new Opportunity Classes for the unique requirements of your organization. Each new opportunity class requires a business object and an SQL component:



Components of an Opportunity Class

To create an Opportunity Class

For details on the following procedure, see the *Example: Building a Job opportunity class and type*.

1. Open Microsoft SQL Server and create a new table, granting appropriate permissions.
2. Open the Business Object Architect.
3. Add the new table to the *iMIS* .NET framework.
4. Specify the new Opportunity Class properties.
 - Build a relationship between the new class and existing classes.
5. Define lookups for the new business object.
6. Edit the Opportunity Type to display the new opportunity class in the Process Manager **Set Up Module**.
7. Build and publish the new business object.

Example: Building a job opportunity class and type

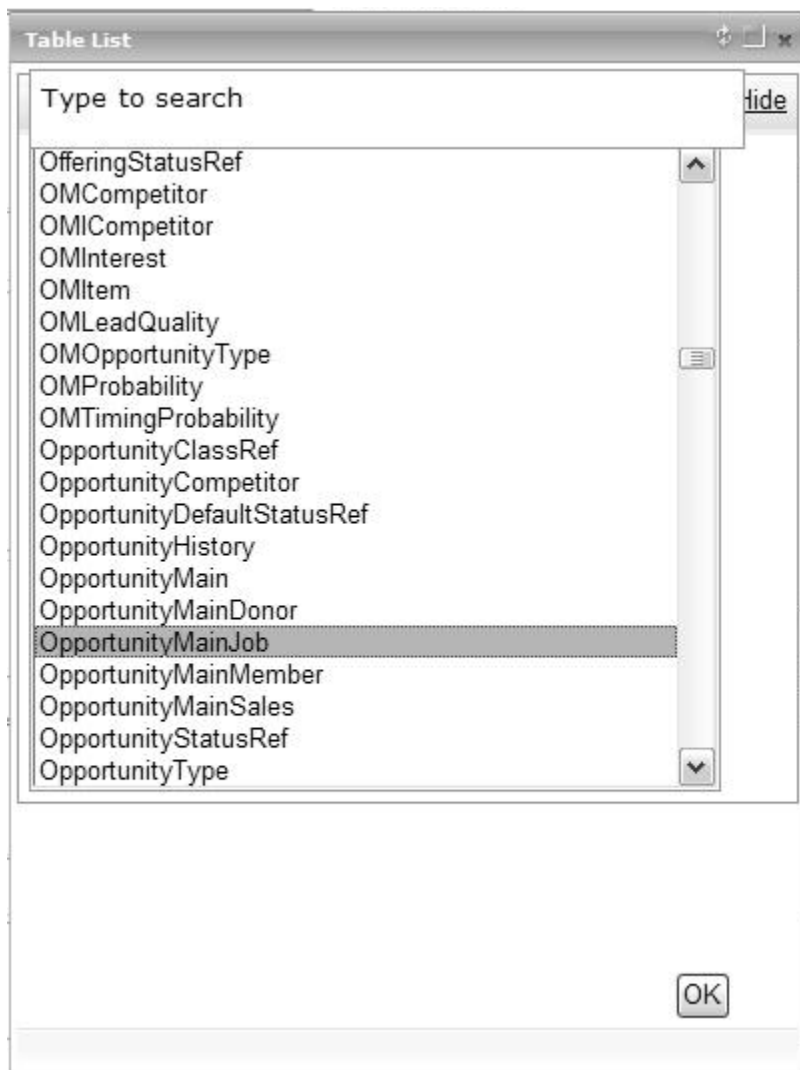
1. First note and verify the following:
 - OpportunityKey is a required field.
 - Set permissions on the SQL table to select on the *iMIS* Group.
 - Define OpportunityKey as the primary key on the SQL table.
2. In Microsoft SQL Server, create a SQL table called OpportunityMainJob that contains the fields to display in the opportunity:

```

if exists (select * from dbo.sysobjects where id =
    object_id(N'[dbo].[OpportunityMainJob]'))
and OBJECTPROPERTY(id, N'IsUserTable') = 1)
drop table [dbo].[OpportunityMainJob]
GO
  
```

```
CREATE TABLE [dbo].[OpportunityMainJob] (
    [OpportunityKey] [uniqueidentifier] NOT NULL ,
    [JobNumber] [int] NOT NULL )
```

3. Create a new OpportunityJob business object.
 - Go to **Tools** and open BOD.
 - Click **New > Design Business Definition**.
4. On the **Definition** tab, in the **Name** field, enter OpportunityJob.
5. On the **Definition** tab, next to **Inherits from**, click **Browse** and then choose the **Opportunity** business object as a basis for the OpportunityJob business object and click **OK**.
6. Click **Create Object**.
The business object is created and more tabs are available.
7. Make the OpportunityMainJob SQL table part of the .NET framework:
 - On the **Database** tab, select **Add**.



- Select the new OpportunityMainJob table.

- Click **OK**.
- 8. Join the newly created table to the OpportunityMain table.
 - Next to tables, select **OpportunityMainJob**.
 - Next to **Joins**, select **OpportunityMain.OpportunityKey** and **OpportunityMainJob.OpportunityKey**.

The screenshot shows a window titled 'Joins'. It has two dropdown menus. The first dropdown contains 'OpportunityMain.OpportunityKey' and the second dropdown contains 'OpportunityMainJob.OpportunityKey'. There is an equals sign between the two dropdowns. To the right of the second dropdown is an 'Add' button.

- Click **Add**.
- 9. Create a property for the columns you want to display:
 - Next to **Available Columns**, select the field you want as properties, such as **OpportunityMainJob.JobNumber**.
You do not have to select OpportunityMainJob.OpportunityKey. It is the required field that already exists in OpportunityMain.

The screenshot shows a dialog box with a tab labeled 'Available Columns'. On the right side, there is a list of columns: 'OpportunityMain.MarkedForDeleteOn', 'OpportunityMainJob.JobNumber' (which is highlighted with a grey background), and 'OpportunityMainJob.OpportunityKey'. At the bottom of the dialog, there are two buttons: 'Add as Properties' and 'Add All as Properties'.

- Click **Add as Properties**.
- 10. Click **Save**.
- 11. Customize the OpportunityJob display properties:
 - On the **Properties** tab, refine the field displays and add the desired look-up values:
 - The property name is pulled directly from the SQL table. Click the edit icon (small pencil) to modify any values.
 - (optional) Convert field names to user-friendly labels, such as changing JobNumber to Job Number.
 - Click **Save**.
 - Click **Compile**.
You see a progress message, and then you should get a message stating "Opportunity:Information: Compiled With No Errors."
 - Click **Close**.
 - Click **Publish**.
You see a progress message, and then you should get a message stating "OppJobs:Information: Published With No Errors."

- Click **Close**.
12. Modify the OpportunityType business object:
- Open the OpportunityType business object.
 - Click the **Properties** tab.
 - From the **Properties** list, select **OpportunityClass**.
 - Click the **Values** tab.
 - Click **Add**.
 - In the **Display Value** field, enter “Job”.
 - In the **Data Value** field, enter “OpportunityJob”.

OpportunityType

Definition Properties Constraints Actions Database

Properties

Property Name	Data Type	Length	Scale	Key	Required	Constraints
Name	VarChar	50		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
UpdatedByUserKey	Guid			<input type="checkbox"/>	<input type="checkbox"/>	
UpdatedOn	DBTimeStamp			<input type="checkbox"/>	<input type="checkbox"/>	
OpportunityClass	VarChar	50		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
OpportunityTypeKey	Guid			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Definition Display Values Constraints

Default Value

Values Come From

☐ Freeform data entry ☐ Finder ☐ Query Object ☒ Value List

Values

Data Value	Display Value	
OpportunitySales	Sales	
OpportunityDonor	Donor	
OpportunityMemb	Member	
OpportunityJob	Job	
<input type="text"/>	<input type="text"/>	

- Click **Save**.
- Click **Close**.

- ❑ Click **Compile**.
 - ❑ Click **Publish**.
13. Create a new Opportunity Type for **OpportunityJob**:
- ❑ From **Process Mgr**, select **Set Up Module**.
 - ❑ Click **Add Type**.
 - ❑ Define the opportunity type. **Job** displays in the **Opportunity Class** list.
 - ❑ Click **Save**.

Modifying task properties

Tasks in Opportunity Management action plans can be modified in the BOD.

To modify task properties

1. From **BOD**, select the task item.
2. Click **Edit**.
3. Select the item to edit.
4. Click **Save**.

Modifying role-based security settings

The default group roles supplied with Process Manager are Prospect, Opportunity Owner, Contact, and Competitor. You can build additional group roles that better describe responsibilities within your organization and can assign those group roles to the appropriate participants.

To create opportunity group roles

1. From **System Setup**, select **Security Administration**.
2. Select **Roles**.
3. Click **Add Role**.
4. Enter the information for the new role.
5. Click **Save**.

To assign opportunity group roles

1. From **System Setup**, select **Security Administration**.
2. Select **Users**.
3. Search for the user record.
4. Select the user.
The **User Definition** page displays.
5. In the **Roles** section, click **Add Role**.
6. Select the desired role and click **OK**. The new role displays in the **Roles** list.

To specify security settings for queries or reports

Each query or report must have a security setting to determine which users can view or edit the query.

1. From **Tools**, select **Intelligent query architect**.

2. Select **OpportunityManagement > Default System > Queries**.
3. Select the query or report and click **Edit**.
The **Query Summary** page displays.
4. Select **Security**.
5. From the **Access Mode** drop-down list, select the mode.
6. (optional) To change the permissions for a role:
 - ☐ From the **Access Mode** drop-down list, select **Custom**.
 - ☐ From the **Select a Query** drop-down list, select **Roles**.
 - ☐ Click **Find** to display a list of roles.
 - ☐ Select a role name to add it to the **Current Access List**.
7. Click **Save**.

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